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U.S. Hispanic Market 1984

Strategy Research
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ACKNOWLEDGEMENTS

In 1979, Maria Elena Torano, the first President of the National Association of Spanish Broadcasters met with Richard W. Tobin, President of Strategy Research Corporation, to design the first comprehensive, reliable Market Study with regard to the growing U. S. Hispanic Market.

Both had realized the need for such a Study. However, it had never been done. With the financial aid of the Department of Commerce, Office of Minority Business Development Agency, and J. Walter Thompson Advertising, the NASB and STRATEGY RESEARCH CORPORATION created the U. S. Hispanic Market - 1980. This Study was completed in August, 1980 and presented in a series of seminars in the Fall of 1980. The NASB has not continued in operation, however, the market has requested a new Study with data to properly assess the current U. S. Hispanic Market. With the financial support of over 40 U. S. Corporations, this 1984 Study has been completed.

We wish to acknowledge the original work that went into the first 1980 Study, and to acknowledge the participation and efforts of Emilio Nicolas, Maria Elena Torano, Antonio Guernica, Carmen Junco and Tony Ruiz in creating that Study.

As a guide lights the way for those who follow, these people worked diligently with Strategy Research Corporation in 1980 to create the first U. S. Hispanic Market Study. Their efforts should not be forgotten.

GRACIAS

Over forty U. S. companies made this Study possible, by providing substantial contributions to sponsor this Project. Without them, this Study would not have been completed.

These companies have made a bold statement by their sponsorships which attests to their committment to the U. S. Hispanic Market.

Strategy Research Corporation wishes to thank them, and to acknowledge their sponsorship of this Project.

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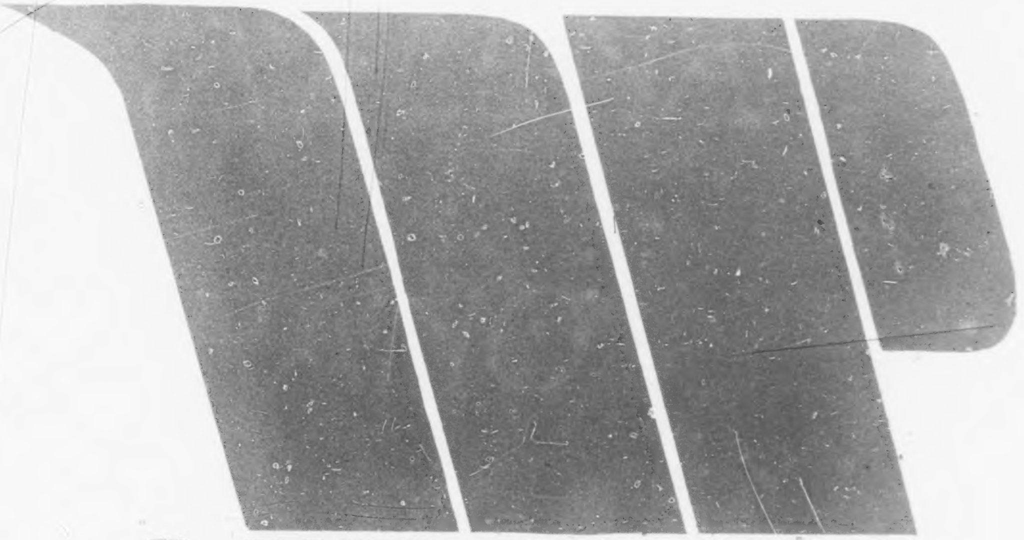

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I. PURPOSE, SCOPE AND METHODOLOGY

A. PURPOSE AND SCOPE OF THE STUDY

The Purpose of this Study is to provide marketing and media decision-makers with comprehensive and useful information on the U.S. Hispanic market. Much of the report centers on demographic characteristics such as population estimates, geographic concentrations, age/sex distributions and income levels. However, the report goes beyond basic statistics by taking a historical look at Hispanic participation and assimilation in this country.

Also presented are cultural characteristics which reflect the attitudes and characteristics that reflect the U.S. Hispanic population.

The Scope of this study is the United States and the Commonwealth of Puerto Rico.

This Study seeks to present not only population estimates and socio-economic data on this market, but also to show how and why the market has grown.

B. METHODOLOGY

Strategy Research Corporation conducted both primary and secondary research in the gathering and analysis of information provided in this report.

Secondary data sources are cited in the report. Several U.S. Census publications were utilized in addition to almanacs and atlases, books whose subject matters dealt with Hispanics, periodicals, State and Federal sources, Strategy Research Corporation sources, as well as several other miscellaneous publications.

It is important to note, however, that communication with a number of competent agencies was accomplished in the conduct of this Study.

Population totals were drawn from U.S. Department of Commerce, Bureau of the Census published reports. Population forecasts utilized in the Study were made in 1984 by Strategy Research Corporation, experts in the field of demography and forecasting.

With regard to population and socio-economic projections and forecasts, the primary method of data collection used for this Study consisted of Personal Interview surveys conducted by SRC. These surveys have been analyzed to provide the basis for population and socio-economic characteristic estimates and forecasts, along with a significant amount of other data published by various reliable sources, including the Bureau of the Census, the Department of Immigration, and Market Statistics, Inc.

With regard to the current Lifestyle, Media Habits, Buying Power and Product Usage, the primary research conducted by Strategy Research Corporation consisted of utilization of the Survey Research Method.

The sample for the Lifestyle and Language data (Section IV) consisted of 3,939 interviews spread throughout 28 U.S. Hispanic markets.

The sample utilized to obtain the Product Usage data (Section IX) consisted of a total of 3,501 interviews among Hispanics in 13 different U.S. markets. In addition, 600 non-Hispanic interviews were conducted using a national probability sample and In-Home interviews.

The sample utilized to obtain the Television Viewing Habits consisted of 12,890 interviews conducted for the STAR Surveys in the Spring of 1984.

The Sampling Frames utilized consisted of Census Block data and Household data updated to 1984 by Strategy Research Corporation. SRC maintains current updated Census Block, Census Tract and Household data for major U.S. and Hispanic markets for survey and economic research purposes.

The Lifestyle and Product Usage surveys consisted of Personal, In-Home Face-to-Face interviews, conducted by trained, professional interviewers of Strategy Research Corporation working under the supervision of SRC Field Staff supervisors. In addition, all interviewing was conducted by Latin-origin, bilingual interviewers.

Only one individual per household was interviewed. All respondents were U.S. Hispanics 18 years of age or older.

Following the completion of field interviewing, twenty percent of each interviewer's work was validated daily. Questionnaires were then carefully edited, coded and prepared for computer tabulation.

All programming and data processing was done in-house by full-time SRC personnel. SRC operates one of the largest In-House Marketing Research Computer Facilities in the United States.

For the STAR TV Audience Estimate Studies, the Personal In-Home Day-After-Recall Method was utilized and is discussed in detail in those syndicated studies.

A Few Methodological Notes:

For purposes of this report, "Hispanic" is defined as those persons of Spanish origin or heritage who speak Spanish. Although their dictionary meanings may differ, the terms "Hispanic," "Latin" and "Spanish" are used interchangeably throughout the text.

Limitations:

Strategy Research Corporation employs the best of industry practices and standards in its work, and utilizes the best efforts to produce reliable studies. Nevertheless, no claim is made that the Survey is free of all errors, and the firm accepts no liability for the information or interpretation contained within this Report.

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II. IMMIGRATION TO THE UNITED STATES

II. IMMIGRATION TO THE UNITED STATES

A. LATIN IMMIGRATION TO THE UNITED STATES

In the 30 years from 1951 to 1981, over 30% of the immigration to the United States has come from Latin America and Spain. During this period, Latins were the largest group of U. S. Immigrants.

Immigration from Latin America increased from 23.2% of the total U.S. Immigration in the 1950's to over 30% from 1961 to 1980. These figures reflect legal immigration and do not include those with refugee status or illegal immigrants. Also, these figures do not include Puerto Ricans, who are U.S. citizens and are not reported in Immigration statistics.

This recent immigration of Hispanics, added to the significant base of those already here, makes the Hispanic community in the United States a large and visible segment of its population.

The following table shows immigration in 10 year increments from the years 1951 to 1981.

U.S. TOTAL IMMIGRATION BY MAJOR COUNTRIES & AREAS
1951 - 1981

	1951 - 1960		1961 - 1970		1971 - 1980		1981		1951 - 19	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Europe:										
Germany	477,765	19.0%	190,796	5.7%	74,414	1.7%	6,552	1.1%	749,527	6.9%
Italy	185,491	7.4	214,111	6.4	129,368	2.9	4,662	0.8	533,632	4.9
United Kingdom	204,468	8.1	214,518	6.5	137,374	3.1	14,997	2.5	571,357	5.2
Ireland	48,362	1.9	32,966	1.0	11,490	0.3	902	0.2	93,720	0.9
Austria/Hungary	103,743	4.1	26,022	0.8	16,028	0.3	948	0.2	146,741	1.3
U.S.S.R.	584	0.0	2,336	0.0	38,961	0.9	9,223	1.5	51,104	0.5
Scandinavia	55,616	2.2	41,801	1.3	14,811	0.3	1,669	0.3	113,897	1.0
Spain	7,894	0.3	44,659	1.4	39,141	0.8	1,711	0.2	93,405	0.9
Other Europe	241,717	9.6	356,154	10.7	338,881	7.5	26,031	4.4	962,783	8.8
TOTAL EUROPE	1,325,640	52.7	1,123,363	33.8	800,368	17.8	66,695	11.2	3,316,068	30.4
Canada	377,952	15.0	413,310	12.4	169,939	3.8	11,191	1.9	972,392	8.9
Caribbean (Non Spanish)	34,391	1.4	167,613	5.0	324,531	7.2	44,225	7.4	570,760	5.2
Latin America										
Cuba	78,900	3.1	208,500	6.3	268,593	6.0	10,858	1.8	566,851	5.2
Dominican Republic	9,800	0.4	94,100	2.8	148,000	3.3	18,220	3.1	270,120	2.5
Mexico	299,811	11.9	453,937	13.7	640,294	14.2	101,268	17.0	1,495,310	13.7
Central America	44,751	1.8	101,330	3.0	134,640	3.0	24,509	4.1	305,230	2.8
South America	91,628	3.6	257,954	7.8	295,741	6.6	35,913	6.0	681,236	6.2
Other America	59,711	2.4	19,630	0.6	789	0.0	158	0.0	80,288	0.7
TOTAL LATIN AMERICA	584,601	23.2	1,135,451	34.2	1,488,057	33.1	190,926	32.0	3,399,035	31.1
Asia:										
China	9,657	0.4	34,764	1.0	124,326	2.8	25,803	4.3	194,550	1.8
India	1,973	0.1	27,189	0.8	164,134	3.7	21,522	3.6	214,818	2.0
Japan	46,250	1.8	39,988	1.2	49,775	1.1	3,896	0.6	139,909	1.3
Turkey	3,519	0.1	10,142	0.3	13,399	0.3	2,766	0.5	29,826	0.3
Other Asia	88,707	3.5	315,688	9.6	1,236,544	27.5	210,356	35.3	1,851,295	16.9
TOTAL ASIA	150,106	6.0	427,771	12.9	1,588,178	35.3	264,343	44.3	2,430,398	22.3
All Australia	16,204	0.6	21,331	0.6	25,594	0.6	2,055	0.3	65,184	0.6
All Africa	14,092	0.6	28,954	0.9	80,799	1.8	15,029	2.5	138,874	1.3
All Other Countries	12,493	0.5	3,884	0.1	15,866	0.4	2,138	0.3	34,381	0.3
TOTAL ALL COUNTRIES	2,515,479	100.0%	3,321,677	100.0%	4,493,314	100.0%	596,600	100.0%	10,927,070	100.0%

Notes: Because of changes in boundaries and changes in lists of countries, data for certain countries are not comparable throughout.

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

The following Report will give a brief history of the development of the United States. It explains past and present immigration to the U. S. and why the Latin community is growing so rapidly. In addition, the discussion regarding the underlying reasons for current immigration to the U. S. provides a view of the future and shows that future Latin immigration could maintain at the current rate or accelerate.

B. HISTORICAL BACKGROUND

1. 1500 – 1850

Before 1850, the U. S. was in a period of settlement by several European nations. The years 1500 to 1850 witnessed the early Exploration of the U. S., Development of the early Spanish and English settlements and American Colonies, the Louisiana Purchase, Independence of Texas, the "Manifest Destiny" of the U. S. and the Population Growth from 1790 -1850.

Early Exploration

Nearly two-thirds of the explorers in the first hundred years after Columbus were from Spain. These Spanish explorers were seeking gold for the Spanish treasury and also to claim and colonize the territories in order to enlarge and enrich the Spanish Empire. With these explorers came missionaries whose purpose was to convert the Indians to Christianity.

These explorers roamed as far north as Virginia, which had a climate that they felt was unsuitable for settlement, and as far west as California.

Early Spanish Settlements

As these explorers stopped at the Caribbean Islands on their westward drive, they settled and established colonial governments on each one. Santo Domingo was founded in 1496 and became the first administrative and supply center for all ships traveling from the colonies to Spain.

Puerto Rico was settled in 1508 by Ponce de Leon. Its main importance was as a military outpost of the Spanish Empire. Its economy was strictly agrarian.

Due to its natural harbor and proximity to the Florida straits and shipping lanes, Havana, founded in 1515, replaced Santo Domingo as the crossroad for ships from Mexico and Spain and, finally, cultural center of the New World.

In 1519, with the defeat of the Aztecs in Mexico by Cortez, and the realization of the wealth to be found, thousands of Spaniards began streaming to the New World, both to seek wealth and to spread Christianity.

The Spanish concentrated their colonization in Central and South America, where the existing civilizations were advanced and gold and silver were found in abundance.

Conquistadors set out from Mexico to explore the land in all directions. They reached and founded St. Augustine, Florida in 1565, more than 40 years before the first British settlement at Jamestown. The Spanish also crossed to the southwest and California seeking gold.

In 1598, Don Juan de Onate, leader of a Spanish expedition, formally claimed all land north of the Rio Grande for Spain. In the first 30 years of the 17th Century, 25 settlements and missions were founded in the southwest. The City of Santa Fe, the capital, was founded in 1609, about the same time that the British founded their first colony at Jamestown.

Spain did not spread its settlements into other such such as Texas, California, and Arizona until the end of the 18th Cenury, when they began to worry about other European powers usurping the land. In 1769, Spain turned to California and established a chain of 21 missions along the coast.

American Colonies

In the 1760's, as Spain was developing its chain of missions in California, the 13 British colonies had a population of one and a half million people.

At this time, three out of every four colonists were descendants of English and Irish settlers. The balance of the people were Scottish, Dutch, German and Swedish, and were already being described as having melted into a new breed - American.

Although each colony was autonomous, in many respects the British maintained economic control, against which the Americans finally rebelled, declaring their independence in 1776. The colonists successfully fought the British, and a peace treaty was signed in 1783, creating a new country of the United States.

Along with the formation of the United States in 1783, all land east of the Mississippi was free and open to settlers.

The United States purchased the Louisiana territory in 1803 from France for 25 million dollars. Spain, as the original owner, had traded the land to France in 1800. This territory extended from Louisiana to Canada, including what now are the states of Louisiana, Arkansas, Iowa, Nebraska, Oklahoma, Kansas, North and South Dakota, Wisconsin, Minnesota, and part of Montana. Spain agreed to sell Florida to the U.S. for 5 million dollars in 1819.

Texas Independence

Mexico was also striving for independence from Spain. This was granted in 1821. Mexico at that time included California, Texas, Arizona, New Mexico, Nevada, Utah and part of Colorado.

In 1800, the area now known as Texas (then part of Mexico), had a population of 5,000 Hispanics. In 1821, a St. Louis banker, Moses Austin, was given a land grant by the Mexican government to settle 300 American families in the area. Many other settlers followed, and in ten years the new settlers outnumbered the Mexicans four to one.

Although the Mexicans taught the settlers a great deal about living in this land where the climate was different from what they were used to, the Americans did not adopt the Mexican ways or customs nor want to be ruled by a "foreign" government, even though the Americans were on Mexican soil. In an attempt to maintain control over the area, Mexico placed restrictions on immigration and assumed dictatorial powers over the area.

The American colonists rebelled and proclaimed Texas to be independent in 1836. Mexico refused to recognize their independence and when Texas was voted into the U. S. as a state in 1845, Mexico accused the U. S. of planning the whole rebellion. In fact, the U. S. had concurrently been attempting to purchase Texas, Califonia, and New Mexico, but Mexico had refused to sell.

Manifest Destiny

The U. S. had come to believe in a "Manifest Destiny" - that the U. S. was destined to stretch from the Atlantic to the Pacific - and if land could not be bought, it could be acquired by other means.

In 1846, President Taylor ordered troops to a disputed border area and after a clash with Mexican troops, war was declared. The U. S. attacked the Mexicans as far west as California and invaded Mexico as far south as Mexico City.

Mexico was overwhelmed and quickly defeated. The Treaty of Guadalupe Hidalgo in 1848 awarded the U. S. all the Mexican territory north of the Rio Grande: Texas, Arizona, New Mexico, California and parts of Colorado, Utah and Nevada. In exchange for this vast territory, Mexico was paid 15 million dollars.

Thus, with a stroke of a pen, the United States gained a vast Spanish heritage and although the Spanish population was not great in numbers at the time, the culture and traditions were so instilled in these areas that no amount of non-Spanish settlement could erase them.

Because the Spanish people in these areas were already settled when the territories were acquired, their numbers do not appear in any immigration records. Thus, it appears from the records that the U. S. had no major Spanish influx until the 20th Century.

One last purchase between the U. S. and Mexico in 1853 (the Gadsden Purchase), aligned the border and gave the U. S. an additional 75,000 Mexicans as citizens. Thus, the "Manifest Destiny" of the U. S. was accomplished.

Population Growth 1790-1850

The first census of the new country was conducted in 1790. At that time, the population stood at 3,930,000. Only about 100,000 of these people lived west of the Alleghenies. However, people soon began to stream westward. Kentucky became a state in 1792. For those people who had already taken the step of crossing the ocean to America, pulling up stakes to move westward, in the hope of improving their lot even further, was not difficult.

During the time that this large internal migration westward was taking place, immigration to the United States was minimal. In the fifty years between 1790 and 1840, fewer than one million new residents arrived.

Immigration statistics were not kept until the year 1820, but since that time we can see the progression of immigrants to the U. S.

The following table shows a comparison of population growth to the number of immigrants throughout the history of the U. S.

U. S. POPULATION & IMMIGRATION 1790 -1980

As Of:	Total Population	Population Increase	Number Of Immigrants	Immigrants As Percent Of Total Increase
1790	3,930,000	—	—	—
1820	9,640,000	5,710,000	— *	—
1840	17,069,450	7,429,450	744,595	10.0%
1850	23,190,000	6,120,550	1,719,606	28.1
1790-1850	23,190,000	19,260,000	2,464,201	12.8
1900	75,995,000	52,805,000	16,659,405	31.5
1920	105,710,600	29,715,600	14,531,197	48.9
1950	150,697,000	44,986,400	5,670,678	12.6
1900-1950	150,697,000	74,702,000	21,897,000	29.3
1970	203,235,300	52,538,300	5,837,156	11.1
1980	226,545,805	23,310,505	4,493,314	19.3

* Records not kept until 1820.

Data available through 1984

Source:
U. S. Bureau of the Census
U. S. Immigration & Naturalization Service
Strategy Research Corporation

From fewer than a million immigrants recorded in the 50 year period 1790-1840, there was an influx of 1.7 million in the ten years between 1840-1850. This represented 28.1% of the total population increase for that 10 year period.

2. 1850 - 1900

In the period from 1850 to 1900 Spanish immigration was imperceptible.

Migration & Immigration

The second half of the 19th Century was the time of major westward expansion now that the borders of the United States extended from the Atlantic to the Pacific. More and more settlers moved into the western lands and further outnumbered the Mexican-Americans in the area.

At the same time, immigrants were beginning to pour into the U. S. from Ireland. Escaping the potato famine in the eight years between 1846 and 1854, 1.2 million Irish arrived in the U. S. In the years 1852-1854 a half million Germans also arrived.

Not until the end of the century was there again such a concentrated influx of immigrants; and by then, with the industrial revolution beginning and railroads being built, there was an enormous need for labor in this country.

During this 50 year period (1850 - 1900), although there was virtually no in-migration of Spanish residents, the population of the century tripled, from 23 million in 1850 to nearly 76 million in 1900. Of this increase, 16.1 million, or nearly 32% of the total population increase, were immigrants, as can be seen on the following table.

U. S. POPULATION & IMMIGRATION
1790 -1980

As Of:	Total Population	Population Increase	Number Of Immigrants	Immigrants As Percent Of Total Increase
1790	3,930,000	—	—	—
1820	9,640,000	5,710,000	— *	—
1840	17,069,450	7,429,450	744,595	10.0%
1850	23,190,000	6,120,550	1,719,606	28.1
1850-1900	75,905,000	52,805,000	16,659,405	31.5
1920	105,710,600	29,715,600	14,531,197	48.9
1950	150,697,000	44,986,400	5,670,678	12.6
1900-1950	150,697,000	74,702,000	21,897,000	29.3
1970	203,235,300	52,538,300	5,837,156	11.1
1980	226,545,805	23,310,505	4,493,314	19.3

* Records not kept until 1820.

Data available through 1984

Source: U. S. Bureau of the Census
U. S. Immigration & Naturalization Service
Strategy Research Corporation

From the birth of the country through the 1880's, immigration was mainly from northern and western Europe. Three of every four immigrants continued to come from England, Ireland and Germany.

The next table shows the percent distribution by country of origin in the 80 years of the 19th century for which immigration statistics were recorded compared to the first 50 years of the 20th century.

U. S. IMMIGRATION
PERCENT BY COUNTRY
1820 - 1900

	1820-1900
Germany	26.2%
Ireland	20.2
Great Britian	15.9
Scandinavia	7.5
Italy	5.4
USSR	3.8
Balance of Europe	10.6
Latin America and Caribbean	0.9
Canada	5.5
Asia	2.7
Australia	0.1
Africa	0.0
All Other Countries	1.2
TOTAL	100.0%

Source: Strategy Research Corporation

The following table shows the total number of immigrants by country of origin in the 1820 - 1900 and 1900 - 1950 periods.

IMMIGRATION BY MAJOR COUNTRIES & AREAS
1820 - 1950

	1820 - 1900		1901 - 1950	
	Number	Percent	Number	Percent
Germany	5,010,248	26.2%	1,238,281	6.1%
Ireland	3,873,104	20.3	726,032	3.6
Great Britain	3,028,151	15.8	1,379,016	6.8
Scandinavia	1,439,083	7.5	944,463	4.7
Italy	1,040,479	5.4	3,736,485	18.4
Austria/Hungary	1,027,195	5.4	3,144,909	15.6
Spain	41,361	0.2	131,660	0.7
U.S.S.R.	761,742	4.0	2,582,153	12.8
Other	1,058,726	5.5	1,926,938	9.5
Total Europe	17,280,089	90.4	15,809,797	78.2
Latin America	42,281	0.2	1,039,847	5.2
Caribbean (Non Spanish)	125,598	0.7	371,098	1.8
Canada	1,051,275	5.5	2,126,171	10.5
Asia	375,493	2.0	731,279	3.6
Australia/New Zealand	27,489	0.1	57,430	0.3
Africa	2,213		31,214	0.2
All Other Countries	219,168	1.1	35,040	0.2
TOTAL	19,123,606	100.0%	20,201,876	100.0%

Note: Because of changes in boundaries and changes in lists of countries, data for certain countries are not comparable throughout.

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

As the 19th Century came to a close, the immigration pattern began shifting. More and more immigrants were arriving from southern and eastern European countries, such as Italy, Austria, and Hungary.

Germany, Ireland and England account for over 60% of the total and all of Europe encompasses 90% of the total immigration.

Acquisition of Puerto Rico

Over the years since the awarding of independence to Mexico in 1821, nearly all its remaining colonies in the New World were granted independence by Spain. The two notable exceptions were Cuba and Puerto Rico, whose demands for independence had not been met.

The U. S. had substantial economic interests in Cuba in the late 1800's and there was much interest in an independent Cuba. Spain was willing to make concessions which equated to Cuban independence, but before negotiations could begin, the U. S. Battleship Maine blew up in Havana Harbor and the U. S. declared war on Spain on April 21, 1898. The U. S. occupied Puerto Rico, the only other Spanish possession remaining in this hemisphere, during the war.

In four months, the war was over and Spain agreed to cede Puerto Rico, the Philippines and Guam to the U. S. and grant independence to Cuba.

Puerto Rico, which had been struggling for independence from Spain, found itself a possession of another country, one very different from itself. Its mixed culture of Hispanic, Indian and African elements were confronted with the same Anglo-Saxon Americans who had overwhelmed the Mexicans. For Puerto Ricans, the 20th Century began with a great deal of uncertainty regarding the future.

The beginning of the 20th Century found the U. S. stretching across a whole continent - growing up, developing and flexing its muscles as a coming world power.

3. 1900 - 1950

This period encompasses a shift in immigration patterns, the last surge of unrestricted immigration, subsequent immigration controls and the growth of Hispanic population and Puerto Rican migration.

Immigration and Growth

The first 20 years of the 20th century brought nearly as many immigrants to our shores as the last 50 years of the 19th Century.

The following table shows that in this 20 year period, immigration accounted for nearly one-half (48.9%) of the total increase in population.

U. S. POPULATION & IMMIGRATION
1790 -1980

As Of:	Total Population	Population Increase	Number Of Immigrants	Immigrants As Percent Of Total Increase
1790	3,930,000	—	—	—
1820	9,640,000	5,710,000	— *	—
1840	17,069,450	7,429,450	744,595	10.0%
1850	23,190,000	6,120,550	1,719,606	28.1
1900	75,995,000	52,805,000	16,659,405	31.5
1900-1920	105,710,600	29,715,600	14,531,197	48.9
1950	150,697,000	44,986,400	5,670,678	12.6
1970	203,235,300	52,538,300	5,837,156	11.1
1980	226,545,805	23,310,505	4,493,314	19.3

* Records not kept until 1820.

Data available through 1984

Source: U. S. Bureau of the Census
U. S. Immigration & Naturalization Service
Strategy Research Corporation

Until the end of World War I, American industry welcomed and employed the immigrants as fast as they arrived. However, by 1920, industry had developed, the railroads were built, the West was settled, and unskilled labor was no longer in demand.

There was a dramatic shift in countries of origin of immigrants between 1820 - 1900 and the period 1900 - 1950. The number of immigrants from northwestern Europe dropped sharply while the numbers from countries of southern and eastern Europe rose.

The percentage of German-origin immigrants decreased from a high of 26.2% of total immigrants in the 1820 - 1900 period, to 6.1% of the total in the 1901 - 1950 period. The ratio of Irish immigrants dropped from 20.1% to 3.7% of the total.

On the other hand, Italians rose from 5.4% to 18.5% and Russians increased from 3.8% to 13% of total immigrants.

Latin American immigration grew from less than 1% to 7% of total immigrants arriving between these two periods.

Immigration Restrictions

Prior to 1921 there were very few restrictions on immigration to the United States. Certain people, such as convicts and indigents, were excluded and there were limitations on Asiatics; but in large measure, anyone who could afford passage was allowed into the country. In 1907, 1,285,349 immigrants arrived in the U. S. - the record for any one year.

As industry began needing less unskilled labor and as the number of non-northern European immigrants skyrocketed, restrictions began to be established.

The Immigration Act of 1921 placed a numerical ceiling of 357,000 immigrants per year for countries outside the Western Hemisphere. Each country was allowed 3% of the number of persons of that nationality living in the U. S. in 1910. In 1924, the quota was changed to 2%, and the base year was lowered to 1890.

In 1929, The National Origins Law went into effect. This set a limit of 150,000 immigrants per year and stressed the country of birth rather than country where a person lived and and applied for a visa. It also excluded Asian countries. The purpose of these changes was to prevent any large change in the basic makeup of the U. S. population.

These laws, along with the Depression, drastically reduced the number of immigrants in the 1930's.

Whereas the year 1907 saw 1.2 million people immigrating to the U. S., in the 10 year period from 1931 - 1940, an average of only 53,000 immigrants per year came to this country. The more restrictive immigration laws and the world-wide depression combined to virtually stop immigration. Not since the 1820's had so few people immigrated to this country. The war years, 1941 - 1945 also saw few immigrants arrive.

Growth of Hispanic Populations

By 1930, the Hispanic population in the United States was over 2 million; half of them immigrants in the last generation, the other half descendants of the early settlers who became U. S. citizens when Mexico ceded the Southwest to the U. S. in 1848.

In the early 1900's, thousands of Mexican laborers began coming to the U. S. to harvest crops, help complete the railroads, and find other employment. Eventually, they were to be found working across the country from steel mills in Pittsburgh to meat plants in Chicago. Many of these laborers left their families behind and returned home when they were able. Because of the high demand for labor, these Mexicans simply crossed the border and immigration laws were ignored.

Most of the immigrants who arrived were poor laborers who were seeking to escape poverty in Mexico. Unfortunately, as the Depression swept the U. S. in the 1920's, thse immigrants were the first to be out of work. Many communities found that it was cheaper to pay the expense of sending the Mexicans home than to pay them welfare. A great many Mexicans returned to Mexico during this time, and in the 1936 less than 10% of the seasonal labor available in 1920 was still available.

The onset of World War II revived a huge need for labor in the U. S. At that time, the U. S. and Mexico established the Braceros Program, which sent thousands of Mexican laborers to the U. S. to work in factories and fields. In a two year period over 56,000 Braceros (laborers), came to the U. S. to work. Even that number did not fill all the jobs available, so many Mexicans came into the country illegally.

Thousands of Mexican Americans served in the War, as did many Puerto Ricans who joined the U. S. Armed Forces. Many of the returning soldiers took advantage of the GI Bill of Rights to further their schooling and became trained in professional areas. These people became leaders in their communities, active in government and business.

Puerto Rican Migration

In 1917, the United States granted citizenship to Puerto Ricans. This began a large migration which has never ceased. The Puerto Ricans, like the Mexicans, come to work, send money home and eventually return to Puerto Rico themselves, if possible. Because the Puerto Ricans are citizens, there is a constant migration to and from the Island and their numbers are not included in immigration statistics.

During the war, migration from Puerto Rico was minimal but beginning in 1946, immigration increased dramatically. The advent of regular airline service between New York and San Juan significantly shortened the trip, and many returning soldiers had become steeped in American ways and were anxious to try the American way of life.

While Mexicans entering the country settled in the Southwest and California, a large number of Puerto Ricans went to New York City. The established travel routes were basically between San Juan and New York. Also, New York City possessed already established Puerto Rican barrios where family and friends lived. Although the South and Southwest might have seemed more logical areas for Puerto Rican migration, in the South they would have to compete with the Blacks for jobs and in the Southwest with the Mexican Braceros.

Surprisingly, the second largest Puerto Rican population centered in the U. S. prior to 1950 was San Francisco. Some of the earliest migration of Puerto Ricans went to Hawaii - to work in the sugar cane fields - with San Francisco as the debarkation point.

Overcrowding on the Island of Puerto Rico was a major factor in the immigration patterns to the U. S. The labor supply greatly exceeded the number of jobs on the Island.

C. CURRENT IMMIGRATION PATTERNS AND UNDERLYING REASONS FOR THE IMMIGRATION

There are many reasons why people immigrate to the U. S. and no one knows all the specific underlying reasons, however, there are certain events and conditions which may explain the relatively strong desire of Latin Americans to come, to live, and to work in the United States. These reasons are generally classified as political, social and economic causes and events.

The following Section will capsulize some of the events, as well as political, economic and social conditions occurring in Latin America over the past 30 years which may help to explain the desire of Latins to cross the border into the U. S.

These capsulized observations are brief and incomplete, but help to illustrate the present and perhaps future conditions which effect immigration.

1. 1951 - 1984

From 1951 to 1984, immigrants from Latin America and Spain became the largest group of legal immigrants in the United States.

In addition, they also represented the largest refugee group because of the number of Cuban Refugees and, it is conceded that Latins also represent a majority of all illegal immigrants in the U. S. Also, from 1950 to the present, the U. S. has experienced a large influx of Puerto Ricans who, as U. S. Citizens, are not included in immigration counts.

In this Section of the Report, we will discuss legal immigration by country for the entire 30 year period, as well as breaking it down (by country and area), in 10 year segments from 1951 - 1960, 1961 - 1970, and 1971 - 1980 and showing the most recent data available from the Department of Immigration and Naturalization - 1981.

Rather than merely dealing with raw statistics, this Section of the Report will discuss some of the economic, political and social events which attract legal and illegal residents to the U. S.

Briefly, we will look specifically at Cuba, Dominican Republic, Mexico, Colombia, and the Central American Countries. In trying to understand the root causes of recent immigration perhaps we can anticipate the pattern of future immigration.

Immigration Patterns

From 1951 to 1981, the United States accepted 11 million immigrants. This was more than half of the 20 million accepted between 1900 - 1950 and the 19 million accepted between 1820 - 1900.

Over 30% of the 1951 to 1981 immigrants were from Latin America and Spain, representing approximately 3.5 million immigrants, as seen on the table on the below.

IMMIGRATION BY MAJOR COUNTRIES & AREAS 1820 - 1981

	1820 - 1900		1901 - 1950		1951 - 1981		1820 - 1981	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Germany	5,010,248	26.2%	1,238,281	6.1%	749,527	6.9%	6,998,056	13.9%
Ireland	3,870,104	20.3	726,032	3.6	93,720	0.9	4,692,856	9.3
Great Britain	3,028,151	15.8	1,379,016	6.8	571,357	5.2	4,978,524	9.9
Scandinavia	1,439,083	7.5	944,403	4.7	133,997	1.2	2,517,483	5.0
Italy	1,040,479	5.4	3,736,405	18.4	533,632	4.9	5,310,516	10.6
Austria/Hungary	1,027,195	5.4	3,144,909	15.6	146,741	1.3	4,318,845	8.6
Spain	41,361	0.2	131,660	0.7	93,405	0.9	266,426	0.5
U.S.S.R.	761,742	4.0	2,582,153	12.8	51,104	0.5	3,394,999	6.8
Other	1,058,728	5.5	1,926,338	9.5	942,583	8.6	3,928,247	7.8
Total Europe	17,280,089	90.4	15,809,797	78.2	3,316,066	30.3	36,405,952	72.4
Latin America	42,281	0.2	1,039,347	5.2	3,399,035	31.1	3,544,192	7.3
Caribbean (Non Spanish)	125,598	0.7	371,098	1.8	570,760	5.2	836,971	1.7
Canada	1,051,275	5.5	2,126,171	10.5	972,392	8.9	4,149,838	8.3
Asia	375,493	2.0	731,279	3.6	2,430,398	22.2	3,537,170	7.0
Australia/New Zealand	27,489	0.1	57,430	0.3	65,184	0.6	150,103	0.3
Africa	2,213		31,214	0.2	138,854	1.3	172,281	0.3
All Other Countries	219,168	1.1	35,040	0.2	34,381	0.3	288,589	0.6
TOTAL	19,122,606	100.0%	20,201,876	100.0%	10,927,070	100.0%	50,252,552	100.0%

Note: Because of changes in boundaries and changes in lists of countries, data for certain countries are not comparable throughout.

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

The following table shows the comparison, in 10 year increments of Latin American countries and all other immigration.

U.S. TOTAL IMMIGRATION BY MAJOR COUNTRIES & AREAS
1951 - 1981

	1951 - 1960		1961 - 1970		1971 - 1980		1981		1951 - 1981	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Europe:										
Germany	477,765	19.0%	190,796	5.7%	74,414	1.7%	6,552	1.1%	749,527	6.9%
Italy	185,491	7.4	214,111	6.4	129,368	2.9	4,662	0.8	533,632	4.9
United Kingdom	[illegible]	8.1	214,518	6.5	137,374	3.1	14,997	2.5	571,357	5.2
Ireland	[illegible]	1.9	32,966	1.0	11,490	0.3	902	0.1	93,720	0.9
Austria/Hungary	103,743	4.1	26,022	0.8	16,028	0.3	848	0.2	146,741	1.3
U.S.S.R.	584	0.0	2,336	0.0	38,961	0.9	9,223	1.5	51,104	0.5
Scandinavia	55,616	2.2	41,901	1.3	14,911	0.3	1,669	0.3	113,997	1.0
Spain	7,894	0.3	44,659	1.4	39,141	0.8	1,712	0.3	93,405	0.9
Other Europe	241,717	9.7	356,154	10.7	338,681	7.5	26,331	4.4	962,583	8.8
TOTAL EUROPE	1,325,840	52.7	1,123,363	33.8	800,368	17.8	66,695	11.2	3,316,066	30.4
Canada	377,952	15.0	413,310	12.4	169,939	3.8	11,191	1.9	972,392	8.9
Caribbean (Non Spanish)	34,391	1.4	167,613	5.0	324,533	7.2	44,225	7.4	570,760	5.2
Latin America										
Cuba	78,900	3.1	208,500	6.3	288,593	6.0	10,858	1.8	586,851	5.2
Dominican Republic	9,800	0.4	94,100	2.8	148,000	3.3	18,220	3.1	270,120	2.5
Mexico	299,811	11.9	453,937	13.7	640,294	14.2	101,268	17.0	1,495,310	13.7
Central America	44,751	1.8	101,330	3.0	134,640	3.0	24,509	4.1	305,230	2.8
South America	91,628	3.6	257,954	7.8	295,741	6.6	35,913	6.0	681,236	6.2
Other America	59,711	2.4	19,630	0.6	789	0.0	158	0.0	80,288	0.7
TOTAL LATIN AMERICA	584,601	23.2	1,135,451	34.2	1,488,057	33.1	190,926	32.0	3,399,035	31.1
Asia:										
China	9,657	0.4	34,764	1.0	124,326	2.8	25,803	4.3	194,550	1.8
India	1,973	0.0	27,189	0.8	164,134	3.7	21,522	3.6	214,818	2.0
Japan	46,250	1.8	39,988	1.2	49,775	1.1	3,896	0.5	139,909	1.3
Turkey	3,519	0.1	10,142	0.3	13,399	0.3	2,766	0.5	29,826	0.2
Other Asia	88,707	3.5	315,688	9.5	1,236,544	27.5	210,356	35.3	1,851,295	16.9
TOTAL ASIA	150,106	6.0	427,771	12.9	1,588,178	35.3	264,343	44.3	2,430,398	22.2
All Australia	16,204	0.6	21,331	0.6	25,594	0.6	2,055	0.3	65,184	0.6
All Africa	14,092	0.6	28,954	0.9	80,799	1.8	15,029	2.5	138,874	1.3
All Other Countries	12,493	0.5	3,884	0.1	15,866	0.4	2,138	0.3	34,381	0.3
TOTAL ALL COUNTRIES	2,515,479	100.0%	3,321,677	100.0%	4,493,314	100.0%	596,600	100.0%	10,927,070	100.0%

Notes: Because of changes in boundaries and changes in lists of countries, data for certain countries are not comparable throughout.

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

The next table covers Hispanic Immigration by country and shows that from 1950, 42% of the total legal immigration from Hispanic countries was from Mexico. The second largest number of immigrants came from Cuba with 16.2% of the total. (This does not include several hundred thousand refugees as only those with refugee status who have applied for permanent residency are counted in immigration statistics.) The Dominican Republic is third with 7.7% of the total. (These figures reflect only recognized legal immigration and, therefore, exclude any recognition of the thousands of Puerto Ricans in this country as well as the thousands of persons who have entered illegally.)

HISPANIC IMMIGRATION
BY COUNTRY OR REGION OF BIRTH
1951 - 1981

	1951 - 1960		1961 - 1970		1971 - 1980		1981		1951 - 1981	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Mexico	299,811	50.6%	453,900	38.5%	640,294	41.9%	101,268	52.6%	1,495,348	42.8%
Cuba[2]	78,900	13.3	208,500	17.7	268,593	17.6	10,858	5.6	566,851	16.2
Dominican Republic	9,800	1.7	93,300	7.9	148,045	9.7	18,220	9.4	269,465	7.7
Argentina	19,500	3.3	49,700	4.2	30,015	2.0	2,236	1.2	101,451	2.9
Brazil	13,300	2.3	29,300	2.5	17,970	1.2	1,616	0.8	62,586	1.8
Colombia	18,000	3.0	72,000	6.1	77,289	5.1	10,335	5.4	177,624	5.1
Ecuador	9,800	1.7	36,800	3.1	50,133	3.3	5,129	2.7	101,862	2.9
Peru	7,400	1.2	19,100	1.6	29,121	1.9	4,664	2.4	60,285	1.7
El Salvador	5,900	1.0	15,000	1.3	34,501	2.2	8,210	4.3	63,611	1.8
Guatemala	4,7000	0.8	15,900	1.3	29,591	1.7	3,928	2.0	50,479	1.4
Honduras	6,000	1.0	15,700	1.3	17,352	1.1	2,358	1.2	41,410	1.2
Panama	11,700	2.0	19,400	1.6	23,372	1.5	4,613	2.4	59,085	1.7
Nicaragua	3		3		12,437	0.8	2,752	1.4	15,189	0.4
Other Latin America	99,190	16.7	106,851	9.1	112,984	9.4	14,739	7.7	333,688	9.6
Spain	7,894	1.3	44,659	3.8	39,141	2.6	1,711	0.3	93,405	2.7
Total Hispanic Immigration	592,495	100.0%	1,180,110	100.0%	1,527,198	100.0%	192,637	100.0%	3,492,440	100.0%

[1] Does not include Puerto Rico immigration to the U.S. or illegal immigration from any Latin American country.

[2] Does not include several hundred thousand refugees.

[3] Prior to 1972 included Other America. Rounded to nearest 100.

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

Cuba

A significant event in recent history affecting immigration in general and the Hispanic community in particular is the takeover of Cuba by Castro and the subsequent emigration of thousands of Cubans, mostly to the United States. Not since the Jews fled Europe to escape annihilation by Hitler have so many of the ruling classes of a country emigrated from that country.

The opening of U. S. shores to Cuban political refugees in the 1960's sent a signal potential political refugees from Argentina to Mexico and from the Dominican Republic to Chile, that the U. S. would accept political refugees from the Caribbean, and Central and South America. Residents of other countries who fled political oppression could feel entitled to the same treatment as the Cuban political refugees received.

In 1962, the diplomatic relations between the United States and Cuba were severed. This left Cubans, who wanted to leave, with the option of flying to Mexico or Spain where they could then apply for admission to the United States, or escaping in boats.

In 1965, with the Cuban economy stagnating, Castro announced that all who wanted to leave could leave. Flotillas of boats left from Miami to pick up these people. To provide a safer and more orderly evacuation, President Johnson authorized the "Freedom Flights" which brought 270,000 Cubans to Miami between 1965 - 1973.

When the Immigration Act of 1965 limited the number of immigrants from each country, the Cuban Refugees were given a special Refugee Status. These refugees were admitted without visas and were eligible to apply for permanent residency status after they had lived in the United States for two years. Consequently, they do not appear in immigration statistics until 2 or 3 years after they arrived - when they apply for this change in status. Thus, the immigration figures for Cubans only reflect those who have made this application.

In April, 1980, history repeated itself as Castro again announced that anyone who wished to leave Cuba could leave. Hundreds of boats manned by Cuban exiles in Miami once again crossed the Florida Straits to rescue their families.

According to the U. S. Department of Justice, Community Relation Service, 124,789 Cubans entered the U. S. between April 21 and October 10, 1980.

These "Marielitos" as they are known (from the Cuban town of departure), to distinguish them from the original Cuban refugees, created a new challenge for their new country. They had spent 20 years under a communist regime and thus, some had difficulty adapting to their new country. Also, Castro had emptied prisons and mental hospitals and sent these people in the wave of refugees. This caused resentment against the Marielitos by Americans and Cubans alike.

Nearly 87% of this new wave of refugees have settled in Florida, which once again has accepted the burden of assisting these thousands of people to become self-sufficient and productive citizens.

Mexico

Mexicans have long enjoyed an interaction and relationship with relatives on each side of the border and have regarded the United States as a compatible land of opportunity. In the last 30 years, immigration from Mexico accounted for nearly half of the total Hispanic legal immigration to the U. S. Mexicans have historically come to the U. S. seeking employment and jobs – jobs which were available in the U. S. but not always available in Mexico.

Recently, however, Mexico discovered that it had great oil reserves and as drilling started, optimism and the economy of Mexico improved dramatically.

Mexico had wealth, but its wealth was still in the ground. Therefore, Mexico and its businesses borrowed against their oil reserves and future profits, Everyone wanted to loan Mexico money and Mexico wanted to borrow money for its economy and people. For a few years the economy prospered. But in the early 1980's, the world found that it had an oil glut, and optimism soured. In Mexico, oil revenues which were to pay loans were not being realized, and lenders realized that their losses were not well secured.

In the ensuing International Debt crisis, the government nationalized the banking system, inflation was high and the value of the peso fell dramatically. The economy slowed and many Mexicans again looked to the U. S. for jobs, incomes and opportunities, entering the U. S. legally and illegally.

Dominican Republic

This country on the island of Hispaniola has sent the third largest number of immigrants to the U.S., since 1951. The recent flow of immigrants from the Dominican Republic began with the assassination of General Trujillo in 1961, and continues unabated to the present.

The Dominican Republic was long considered to be a strong dictatorship. In the 1960's, the U. S. Marines were sent to quell civil disturbances. The apparent interest of the U. S. in its peace-keeping role sent a signal to the Dominican population that the U. S. would offer asylum, protection and opportunity to Dominicans who felt that their opportunities were severely limited in the Dominican Republic.

While the political upheaval may have caused the original impetus for people to leave the country, poor economic conditions and lack of opportunity have been continuing incentives for them to leave.

Central America

The countries of Nicaragua, El Salvador and Guatemala have a history of poliical and economic upheavals.

Thomas P. Anderson, in his book, *Politics and Opinions in Central America*, offers some background for the underlying conditions that exist in Central America:

> "Each of these governments was republican in form, with a presidential system generally modeled on that of the United States. But while it was possible to import the forms of such a government, it proved impossible to impart much of the spirit. While the government of the United States grew organically out of colonial institutions, the newly established Central American governments represented a total break from the traditions of the colonial past. . .Instead of following the common-law system presumed in the United States as the basis of government, the Central Americans were saddled with a Roman law system which held that authority came from above and which gave very little scope to judicial review.
>
> The constitutions of Central America, both in the nineteenth century and in the twentieth, have reflected the confusions arising from the grafting of an alien governmental structure onto a Hispanic legal system. . . As there is little judicial discretion, even the most minute details of what we could term "positive law" find their way into the constitution itself, making the document inflexible and constricting. Most Central American constitutions are likewise difficult to amend.
>
> This means that almost every major governmental upheaval, through coup or civil war, results in a new constitution being established. . .They represent an ideology rather than a simple set of rules for governing.
>
> Whatever the constitution might say, the fact is that the president generally concentrates most of the authority of the republic in his own hands. This may be, as some authorities declare, because of the traditional Hispanic need for caudillos-strong, often military leaders exhibiting the traditional macho virtues and passing out awards to their enemies. . .When constitutions are so constricting that nothing can be accomplished within their framework, the temptation of the executive branch will be to rule by decree, outside constitutional restraints.

. . .Despite these problems of the governmental system in the countries under discussion, there are times when the laws are obeyed, the judiciary functions, and even the legislature plucks up its courage and acts with resolution and independence. At first glance, it appears that the system does not function much of the time because men are corrupt, but the reality lies in the fact that the social and economic system upon which the law are erected is itself corrupt.

. . .To begin with, like much of Hispanic America, this is a death-oriented society. Poverty and malnutrition combine to insure a very high infant-mortality rate (something of the order of 120 per 1,000 live births). Death becomes a constant and familiar companion. . .Life being brief, the emphasis shifts from prolonging one's life to living and dying in a heroic manner. . .If our deaths lack meaning, our lives also lacked it. . . .Tell me how you die and I will tell you who you are. For most men, to die tamely, of some disgusting disease, is thus a disgrace, an unworthy death. The best death is that which gives one the chance to display one's manhood to the fullest. Here the concept of machismo is very important. It is a term against which most North Americans take offense, but it is a very real part of the regional culture of the Central America and does not mean the kind of swaggering bravado that comes to our minds.

Rather, machismo is the noble defiance of death. It is the willingness to dare, to take physical risks, in the face of hopeless odds. Therefore, it has more to do with Don Quixote than with Don Juan. No one has put it as well as Julius Rivera has in his brilliant study, when he wrote:

"A Macho gambles with Destiny, ready to win or lose. He gambles with death, he gambles with God. A burning love affair is a victory over death; sin a victory over God. When the three come together, man has accomplished his fulfillment."

Skill in arms and pride in their possession are traits in ladino society handed down from the time of the conquistadores. Every poor man has his machete; every man who can afford it, his firearms. You can be sure you have won the confidence of a Central American man when he shows you his collection of weapons, which, these days, can include even an automatic rifle. These weapons are there to be used. While it might seen cowardly to assasinate or to shoot from an ambush, to the people of the region, the very act of killing requires courage and machismo.

> These tendencies can be exaggerated, but the acceptance of violence as the normal means of settling disputes, including political ones, is what sets the two cultures apart. The golpe de estado (or coup d'etate) and the cuartelazo (or barracks uprising) are not regarded as aberrations, but rather as normal parts of the political process and sometimes the only, or best, way of affecting change."[1]
>
> 1 Thomas P. Anderson, Politics in Central America, (New York: Praeger Publishers, 1982), pp. 3-5; pp. 13-14.

Mr. Anderson's explanation of the political system and the peoples' outlook, gives one view of the causes of unrest which are so hard for people in the U. S. to understand. He may or may not be entirely correct.

In Nicaragua, the Somoza family ruled for over 40 years, until a civil war, in which an estimated 15,000 people were killed, resulted in the ouster of President Somoza in 1979. A ruling junta of the Sandinistas then took over the country. Over half a million people were displaced because of the war and many more were greatly impoverished as the economy, mostly agrarian, virtually collapsed.

Many people emigrated to the U. S., and many thousands more have fled as refugees to Mexico. From there, many have tried to make their way over land to the U. S.

Civil strife is still continuing, and many Nicaraguans have entered the U. S. illegally. Although they consider themselves political refugees, the U. S. does not recognize a refugee status for them, making them subject to deportation if they are apprehended.

El Salvador is the most densely populated country on the American continent with an impoverished agrarian economy which cannot support its population. Because of this, its neighbors, particularly Honduras, which has had as many as 600,000 immigrants from El Salvador in its country at one time, have long been concerned that El Salvador has ideas of expansion.

Many people may dislike the government of a country and not decide to leave, however, a poor economy which is unable to provide even the basic needs of a people will provide the impetus for people of all types to emigrate, in the hope of finding a better life.

The people from El Salvador have spilled over its borders to Mexico and Hondoras and elsewhere as well as to the U. S. in this hope.

Guatemala is the largest and potentially the wealthiest of the Central American Republics, but it is really two countries in one – Spanish and Indian.

The Indian peasants account for nearly one-half of the population and are at the root of the low economic status of the country. Illiteracy is over 50% as the Indians maintain their ancient ways of the their Mayan ancestors.

The "Spanish" country has a diversified and stronger economy and Guatemala has more industrial opportunities than the other Central American countries. However, even with these positive considerations, there is still civil unrest and persons from Guatemala are immigrating to the U. S. at a rate similar to the other Central American countries.'

South America

Colombia has faced approximately 40 years of civil and social unrest manifested by open clashes between government supporters and an estimated 6,000 leftist guerillas who for years terrorized the country with abductions and murders.

The country was caught up with other Latin American countries experiencing the effects of the international debt crisis. Colombia currently has an 11 billion dollar debt. However, Colombia is the only country in South America that is paying principal as well as interest to its creditors without recourse to the International Monetary Fund. Nevertheless, monetary revenues are dropping rapidly and government efforts to shore up reserves have resulted in a deepening recession, even though Colombia is optimistic about new coal and petroleum production expected in 1985-1986.

Colombia has a very high rate of population growth which, combined with the factors mentioned above helps provide an impetus for emigration.

Other South American countries have experienced economic and political unrest. Chile is coming through the first decade of a bloody resolution.

Argentina is in a transition period from a dictatorship, accused of mass abductions and killings to a civilian democracy.

Venezuela has prospered along with other oil producing nations and suffered with them in the oil glut and international debt crisis, as has Ecuador.

Similar political, economic, and social factors which effect immigration appear in the other South American countries.

Caribbean

While not Spanish speaking nor Latin, immigration from the Caribbean is mentioned here so that it is not confused with immigration from Latin America. Most immigrants from the Caribbean Islands are black, whereas most Hispanic immigrants are white or mulato. These non-Spanish speaking Caribbean Islands have also seen an increase in migration to the U. S. for similar uncertainties of the economic and political situations as occur in Latin American countries.

These islands are also very poor as most lack adequate resources to provide a living for their people. Many are highly dependent on agriculture or tourism, both of which can prove to be uncertain supports of an economy. The two countries of Jamaica and Haiti account for 62% of all immigrants from the Caribbean since 1951, as seen in the following table:

IMMIGRATION FROM THE CARIBBEAN
NON-HISPANIC
1951 - 1981

	1951 - 1981	
	Number	Percent
Haiti	106,883	18.7%
Jamaica	245,269	43.0
Trinidad/Tobago	92,599	16.2
Rest of Caribbean	126,009	22.1
Total Caribbean	570,760	100.0%

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

Jamaica is trying to recover from a decline in tourism caused by a rise in violence in the mid 1970's, but unemployment remains high. Emigration is the answer chosen by many, and large numbers have gone to Great Britain as well as to the U. S.

Haiti is a relatively primitive nation and has few natural resources with which to overcome its overwhelming economic and social problems.

Thousands of Haitians want to emigrate and while some can do so legally, many others attempt it in small boats or pay smugglers to bring them in. Some are able to slip in undetected while others try, only to be stopped en route by the U. S. Coast Guard and sent back to Haiti.

Current Immigration Regulation

In 1965 the United States rewrote its Immigration Act. This Act abolished the ratio system by country and set a numerical limitation of 170,000 persons per year from Eastern Hemisphere countries and 120,000 per year from Western Hemisphere countries, with a 20,000 limit per country. This was the first restriction placed on immigration from Western Hemisphere countries.

While there has always been an undetermined number of people entering this country illegally, this limitation has created a backlog of applicants for visas in the Latin American countries and has created a situation in which many are unwilling to wait. These people enter the country by a variety of means. Some, of course, are smuggled in, but many others enter legally on student, tourist, or temporary work visas and blend into the Hispanic communities when the visas expire.

Congress currently has a new immigration bill under consideration which attempts to come to grips with the problems of illegal immigration. However, it does not appear that it will be acted upon this year in the session of Congress.

Assimilation

Throughout the history of the United States each group of immigrants objected to the next because of cultural differences. Gradually, however, each new group adapted itself to the other(s), inter-married, and blended into the whole.

The early Mexican American settlers have assimilated to a large degree. The American Southwest and California are good examples of two cultures blending together, with the best features of both being adopted by all. While these early Mexican-Americans have become "Americanized," the large number of recent arrivals from Mexico keep them aware of their language, culture, and heritage.

The Mexicans who have arrived in this century have come, not because they were forced to escape persecution, but to seek opportunities just as any American might move to seek a better job. These personal economic reasons allow for the possibility of a return home.

Similar to the Mexican immigrants, Puerto Ricans enjoy considerable freedom of travel. They work in the U. S. and return home to visit or retire.

The Cubans, on the other hand, were fleeing political persecution and have had little opportunity to return to Cuba. The large number of Cubans who arrived in Miami in a short period of time permitted a great deal of needed reinforcement among the refugees to help lessen the cultural shock of being wrenched from their homeland and thrust into a different way of life.

Even as they gradually realized a return home was not going to happen suddenly, they showed a sense of heritage and culture which they did not want their American-born children to forget. Thus, as they learned English and adapted on their jobs to American ways, they still spoke Spanish at home and taught their children to speak it.

Business and tourism from Spanish countries are a constant reinforcement to the U. S. Hispanic population of its Spanish heritage.

As the world becomes smaller, with increased travel and communication in all areas, it becomes more desirable to have a second language, instead of replacing one with another.

The following table shows that the Spanish language is the fourth most frequently spoken language after Chinese, English and Russian.

11 MAJOR LANGUAGES OF THE WORLD
(AS OF MID-YEAR 1983)
(IN MILLIONS)

	Language	Millions of Persons
1	Mandarin (China)	740
2	English	403
3	Russian	277
4	Spanish	266
5	Hindi	264
6	Arabic	160
7	Bengali(Bangladesh, India)	155
8	Portuvese	154
9	Japanese	120
10	Malay-Indonesia	119
11	German	118

Source: The World Almanac, 1984

When we consider these 11 major languages we can see that Spanish is the most desirable Western language to know after English. The bi-lingual Hispanics in our country can communicate with more people in the world than anyone beside the Chinese. Those who drop Spanish completely and adopt English are the poorer for it, and the Spanish-speaking people across the country realize this.

The recent surges of immigrants from Latin America coincide with the upsurge in individual human rights. Each person is encouraged to take pride in and recognize his/her own roots and heritage. Thus, rather than being encouraged to become strictly "Americans", immigrants/ethnic groups are encouraged to maintain their heritage and culture.

Perhaps the most significant factor influencing the assimilation process today is the ability of the current immigrants to return to their homelands if they wish to do so.

Every previous wave of immigrants has come thousands of miles across oceans to arrive on our shores. Those who come to escape religious or politial persecution could not return for any reason. Distance, slowness of travel, time needed for such a journey and money required made it impossible for the majority to ever see their homelands again. However, the Spanish immigrants of this century are virtually next door to home. With the ease in air travel they can be home in hours and many of them do travel home.

This travel and communication back and forth reinforce the language and cultural ties. Not only those who actually travel are affected. The simple proximity and number of Spanish countries near the United States creates a constant awareness of the heritage.

Assimilation has been slow because of the large numbers of recent arrivals and will never equal the absorption of other earlier groups of immigrants for several reasons: The importance of multi-language capabilities, pride of individual roots and heritage, increased flow of tourists and business between the United States and Latin America, the ability to return home, and the proximity of Latin countries.

Recent studies indicate that there is an increasing use of the Spanish language in the U. S., especially in the Miami area. With increased use of the language, the probability of assimilation decreases.

III. POPULATION AND DEMOGRAPHIC PROFILE

III. POPULATION & DEMOGRAPHIC PROFILE

From 1980 to 1985, the Hispanic population of the United States grew by approximately 20% - from 14.6 million persons in 1980 to the present 17.6 million persons. Given reasonable assumptions on fertility, mortality and past immigration experience, Hispanic population will reach 21 million by late 1990 and approximately 27 million by the year 2000.

Among the primary factors contributing to this rapid-growth are the larger Hispanic family, younger age, the higher fertility rate among Hispanics in comparison to the general population and the continuous legal, as well as illegal, immigration to the U.S. from other Hispanic countries.

The Hispanic population in the United States has gradually come to be accepted as being part of American society, having demonstrated their permanence as a distinct cultural group within the United States. Particularly in the large urban areas, Hispanics have created their own neighborhoods and influenced the structure and development of the communities in which they live. Fully 90% of all U.S. Hispanics reside in urban areas.

U.S. Hispanics have the highest median family income of any Hispanic country in the world. U.S. Hispanic income is estimated at $19,900 compared to $28,400 for the general population. Cubans have the highest incomes of all Hispanic groups. In 1985, their median family income is estimated at $24,400, 86% of the U.S. median. Puerto Ricans register the lowest median income among Hispanic families ($14,200).

With regard to educational attainment, the trend toward greater academic achievement and increased penetration of professional and managerial occupations is expected to continue. Currently, 9.4% of U.S. Hispanic males (25 years and over) have completed 4 years of college, while 6.0% of the Hispanic females have done so. In 1985, the percentage of U.S. Hispanics (16 years and over) who are employed in managerial and professional positions totals 12.2%.

The increased economic and educational participation of Hispanics in American society has been accomplished without abandoning the Spanish language. For the 17.6 million Hispanics living in the U.S. today, Spanish is the primary language spoken.

The recent "discovery" and growing appreciation of the Hispanic population as a distinct market segment reflects the sense of permanence attributed to the Hispanic community by American society. For their part, Hispanics in the United States have realized that they can participate in the mainstream of American society without having to sacrifice their Hispanic identity.

A. WORLD RANK

The 1985 Hispanic population of the United States is approximately 17.6 million persons. This qualifies the United States as having the seventh largest Hispanic population in the world, with approximately 800,000 less Hispanics than sixth-ranked Venezuela.

U.S. HISPANIC POPULATION VERSUS OTHER HISPANIC COUNTRIES*
1985

Country	Population (In Millions)	Rank
Mexico	80.5	1
Spain	39.0	2
Argentina	28.7	3
Colombia	28.7	4
Peru	20.3	5
Venezuela	18.4	6
United States	**17.6**	**7**
Chile	12.1	8
Cuba	10.0	9
Ecuador	9.4	10
Guatemala	8.4	11
Dominican Republic	6.7	12
Bolivia	6.4	13
El Salvador	5.6	14
Honduras	4.4	15
Paraguay	3.7	16
Puerto Rico	3.4	17
Nicaragua	3.2	18
Uruguay	3.0	19
Costa Rica	2.3	20
Panama	2.0	21

* Portugal (pop. 10.8 mil in 1985) and Brazil (pop. 137.2 mil in 1985) are not included in definition of term "Hispanic".

Source: Statistical Abstract of the United States 1982 - 1983.
U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

B. COUNTRY OF ORIGIN

Self-classification is the method utilized by the U.S. Bureau of the Census in determining ethnic background. A person is of Spanish/Hispanic origin or descent if the person identifies his or her ancestry with one of the listed groups, that is, Mexican, Puerto Rican, etc. Origin or descent (ancestry) may be viewed as the nationality group, the lineage, or country in which the person or person's parents or ancestors were born.

Of the 17.6 million Hispanics in the United States today, 10.4 million (59.3%) are of Mexican origin. This is more than four times the size of the second largest sub-group (Puerto Ricans) and ten times larger than the Cuban origin segment.

COUNTRY OF ORIGIN
U.S. HISPANIC POPULATION
1985

	1985	
Nationality	Number (000)	Percent Of Total
Mexican	10,406.2	59.3%
Puerto Rican	2,398.9	13.6
Cuban	1,018.6	5.8
Other Hispanic	3,739.0	21.3
TOTAL	17,562.7	100.0%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The Cuban segment represents the largest percentage increase in population (26.3%) due to the Mariel Boatlift from Cuba in the Spring and Summer of 1980, as well as the political upheavel of Castro's regime and the increased economic opportunity in the United States. On the other hand, the number of persons of Mexican origin has increased by almost two million since 1980, due to natural growth and in-migration.

COUNTRY OF ORIGIN
U.S. HISPANIC POPULATION
PERCENTAGE INCREASE
1980 - 1985

Nationality	1980 Number Of Persons (000)	1985 Number Of Persons (000)	1980-1985 Percent Increase
Mexican	8,678.6	10,406.2	20.0%
Puerto Rican	2,005.0	2,398.9	19.6
Cuban	806.2	1,018.6	26.3
Other Hispanic	3,113.9	3,739.0	20.1
TOTAL	14,603.7	17,562.7	20.3%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

1984
U.S. HISPANIC MARKET
COUNTRY OF ORIGIN
BY MARKET AREA

	New York	Florida	California	Texas/ South-West
Cuba	4.8%	87.3%	1.1%	0.7%
Mexico	0.6	0.7	80.9	97.3
Puerto Rico	58.1	3.7	2.9	0.7
Central/South America	13.1	5.0	13.3	0.1
Dominican Republic	21.4	0.7	0.1	0.1
Spain	1.0	2.0	1.1	0.1
Other	1.0	0.6	0.7	1.4
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Both the Texas/Southwest and Florida markets are clearly dominated by specific Hispanic groups. Over 97% of the Hispanics residing in the Texas/Southwest area are of Mexican origin, while in Florida, 87.3% of the Latins stated Cuba as their country of origin.

In New York, Puerto Ricans comprise over half of the Hispanic population (58.1%), while Dominicans and Central/South Americans also constitute a large portion of the Hispanic base (21.4% and 13.1%, respectively).

Nearly 81% of the Hispanics in California reported Mexico as their country of origin, while 13.3% cited South/Central American countries.

C. POPULATION BY REGION AND STATE

Of the 17,562,700 Hispanics in the United States (1985), 5,867,800 (33.4%) reside in the Pacific (California and Hawaii) Region, while 4,926,400 (28.0%) reside in the Southwest (Arizona, New Mexico and Texas) Region. Thus, these two Regions combined represent 61.5% of the total 1985 U.S. Hispanic population.

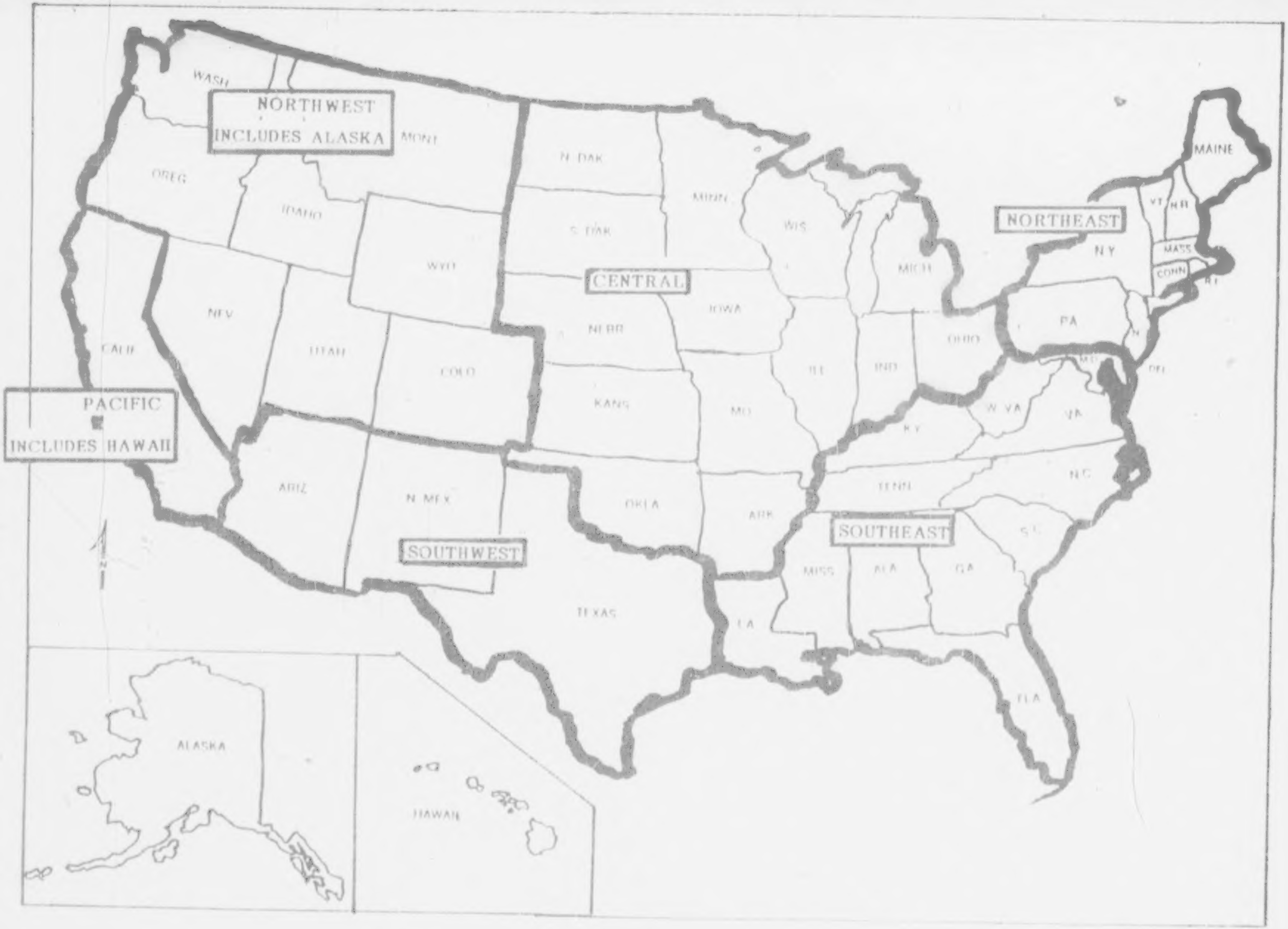
U.S. HISPANIC POPULATION
BY GEOGRAPHIC REGION
1980 AND 1985

Region	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Northeast	2,608.2	2,841.0
Southeast	1,411.0	1,682.9
Central	1,344.8	1,434.8
Southwest	3,903.8	4,926.4
Northwest	723.2	809.8
Pacific	4,612.7	5,867.8
TOTAL	14,603.7	17,562.7

Source: U.S. Department of Commerce
Bureau of the Census

Meanwhile, the U.S. Region which contains the least amount of Hispanics is the Northwest, where less than 1 million Hispanics (809,800) reside representing 4.6% of the total U.S. Hispanic population.

The map on the following page illustrates the U.S. Geographic Regions.


NORTHWEST
INCLUDES ALASKA
PACIFIC
INCLUDES HAWAII
CENTRAL
SOUTHWEST
SOUTHEAST
NORTHEAST
WASH
OREG
CALIF
MONT
IDAHO
NEV
WYO
UTAH
COLO
ARIZ
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KANS
OKLA
TEXAS
MINN
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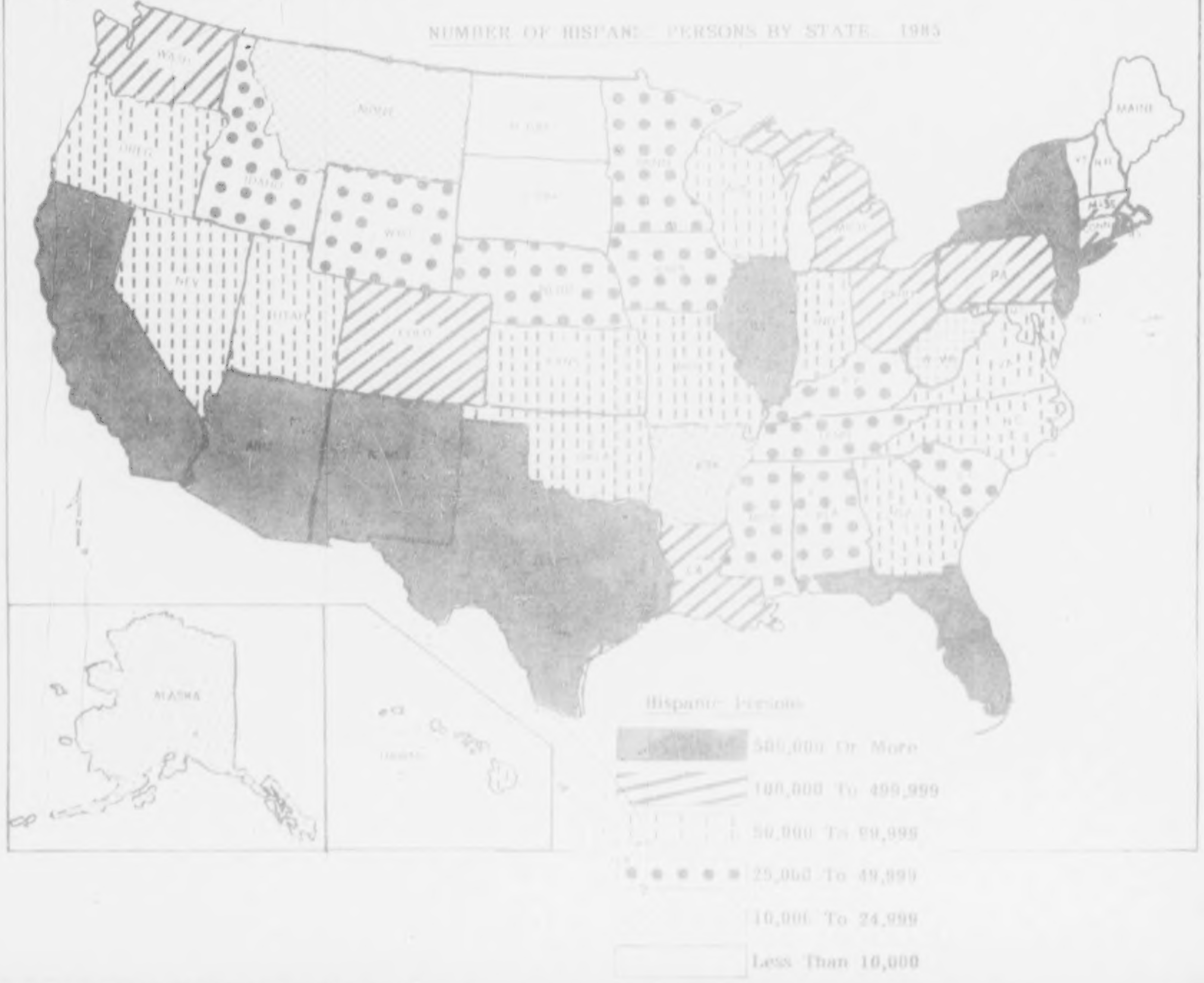
ALASKA
HAWAII

GEOGRAPHIC REGIONS

NUMBER OF HISPANIC PERSONS BY STATE, 1985


WASH
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N MEX
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MICH
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OHIO
KY
TENN
MISS
ALA
GA
FLA
S C
N C
VA
W VA
PA
N Y
MAINE
VT
N H
MASS
CONN
ALASKA
HAWAII
Hispanic Persons
500,000 Or More
100,000 To 499,999
50,000 To 99,999
25,000 To 49,999
10,000 To 24,999
Less Than 10,000

Hispanics live in every state in the United States, however, they still cluster in certain states and metropolitan areas.

A total of 87.6% of all U.S. Hispanics are concentrated in nine states (California, Texas, New York, Florida, Illinois, New Jersey, New Mexico, Arizona and Colorado). Together, these nine states contain 15.4 million Hispanics.

Population is highest in California and this one state contains 33% of all U.S. Hispanics. California, with 5.8 million Hispanics, is home to approximately one of every three Spanish-origin residents.

The concentration of Hispanics is second highest in Texas, followed by New York (22% and 10% of the U.S. Hispanic population, respectively).

Florida, the fourth largest Hispanic populated state with 1,081,900 persons, encompasses 6.2% of all United States Hispanics.

U.S. HISPANIC POPULATION
BY REGION/STATE
1980 AND 1985

Region/State	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Northeast	**2,608.2**	**2,841.0**
Connecticut	125.2	136.9
Maine	5.3	5.3
Massachusetts	141.4	152.8
New Hampshire	5.2	5.8
New Jersey	494.1	605.9
New York	1,661.0	1,744.1
Pennsylvania	153.6	166.8
Rhode Island	19.0	19.8
Vermont	3.4	3.6
Southeast	**1,411.0**	**1,682.9**
Alabama	34.0	33.4
Delaware	9.5	10.5
District of Columbia	17.8	17.6
Florida	858.1	1,081.9
Georgia	61.0	68.5
Kentucky	27.0	31.6
Louisiana	99.7	105.4
Maryland	63.2	70.3
Mississippi	24.2	28.1
North Carolina	56.0	59.7
South Carolina	33.7	35.1
Tennessee	34.0	40.4
Virginia	79.7	87.8
West Virginia	13.1	12.6
Central	**1,344.8**	**1,434.8**
Arkansas	17.0	17.6
Illinois	634.6	681.4
Indiana	86.5	89.6

Continued. . .

U.S. HISPANIC POPULATION
BY REGION/STATE
1980 AND 1985
(Continued)

Region/State	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Central (cont'd)		
Iowa	26.3	28.1
Kansas	62.6	68.5
Michigan	157.6	173.9
Minnesota	32.1	33.4
Missouri	51.9	54.4
Nebraska	28.3	31.6
North Dakota	3.5	4.3
Ohio	120.0	119.4
Oklahoma	57.8	66.7
South Dakota	3.8	4.4
Wisconsin	62.8	61.5
Southwest	**3,903.8**	**4,926.4**
Arizona	444.1	563.8
New Mexico	477.1	532.1
Texas	2,982.6	3,830.5
Northwest	**723.2**	**809.8**
Alaska	9.0	12.3
Colorado	341.4	374.1
Idaho	36.6	42.2
Montana	10.1	12.3
Nevada	54.1	63.2
Oregon	66.2	73.8
Utah	60.0	75.5
Washington	121.3	126.5
Wyoming	24.5	29.9
Pacific	**4,612.7**	**5,867.8**
California	4,541.3	5,790.5
Hawaii	71.4	77.3
TOTAL	**14,603.7**	**17,562.7**

Source:- U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The nationalities of U.S. Hispanics by region and state are presented in numeric and percentage terms in the two tables which follow.

"Mexican" is the predominant nationality in all regions but the Northeast, where "Puerto Rican" is predominant, and the Southeast, which records a cosmopolitan balance of Hispanic nationalities.

HISPANIC POPULATION BY NATIONALITY
UNITED STATES
BY STATE AND REGION
1985
(000)

Region/State	Total Hispanic	Mexican	Puerto Rican	Cuban	Other Hispanic
Northeast	**2,841.0**	**98.3**	**1,605.1**	**208.7**	**928.9**
Connecticut	136.9	4.3	96.5	6.3	29.8
Maine	5.3	1.6	0.8	0.2	2.7
Massachusetts	152.8	8.6	81.0	7.6	55.6
New Hampshire	5.8	1.1	1.2	0.2	3.3
New Jersey	605.9	17.0	296.9	103.6	188.4
New York	1,744.1	41.9	1,027.3	83.7	591.2
Pennsylvania	166.8	21.5	96.8	6.3	42.2
Rhode Island	19.8	1.6	4.2	0.7	13.3
Vermont	3.6	0.7	0.4	0.1	2.4
Southeast	**1,682.9**	**325.0**	**186.9**	**626.1**	**544.9**
Alabama	33.4	18.8	2.6	1.2	10.8
Delaware	10.5	1.5	5.4	0.6	3.0
District of Columbia	17.6	3.1	1.5	0.7	12.3
Florida	1,081.9	95.2	121.2	591.8	273.7
Georgia	68.5	30.3	9.1	6.4	22.7
Kentucky	31.6	16.3	3.7	0.8	10.8
Louisiana	105.4	28.3	4.6	7.7	64.8
Maryland	70.3	13.4	10.3	5.8	40.8
Mississippi	28.1	16.2	1.4	0.5	10.0
North Carolina	59.7	29.1	8.2	2.5	19.9
South Carolina	35.1	18.6	4.2	1.4	10.9
Tennessee	40.4	22.1	2.9	1.2	14.2
Virginia	87.8	26.3	11.0	5.2	45.3
West Virginia	12.6	5.8	0.8	0.3	5.7
Central	**1,434.8**	**918.1**	**224.2**	**36.1**	**256.4**
Arkansas	17.6	10.6	0.7	0.2	6.1
Illinois	681.4	434.8	141.7	21.1	83.8
Indiana	89.6	59.0	13.3	1.8	15.5
Iowa	28.1	20.2	0.7	0.4	6.8
Kansas	68.5	54.3	2.9	0.9	10.4
Michigan	173.9	118.9	13.4	4.0	37.6
Minnesota	33.4	21.3	1.7	0.6	9.8
Missouri	54.4	33.5	2.8	1.5	16.6

Continued. . .

HISPANIC POPULATION BY NATIONALITY
UNITED STATES
BY STATE AND REGION
1985
(000)

(Continued)

Region/State	Total Hispanic	Mexican	Puerto Rican	Cuban	Other Hispanic
Central (Cont'd)					
Nebraska	31.6	24.0	0.9	0.4	6.3
North Dakota	4.3	2.7	0.2	0.0	1.4
Ohio	119.4	52.7	31.6	3.0	32.1
Oklahoma	66.7	43.8	3.6	1.1	18.2
South Dakota	4.4	2.5	0.2	0.0	1.7
Wisconsin	61.5	39.8	10.5	1.1	10.1
Southwest	**4,926.4**	**4,287.9**	**34.0**	**21.4**	**583.1**
Arizona	563.8	505.1	5.1	1.7	51.9
New Mexico	532.1	254.9	2.1	0.5	274.6
Texas	3,830.5	3,527.9	26.8	19.2	256.6
Northwest	**809.8**	**503.3**	**19.3**	**9.5**	**277.7**
Alaska	12.3	5.3	1.5	0.3	5.2
Colorado	374.1	224.0	4.9	1.9	143.3
Idaho	42.2	32.3	0.5	0.0	9.4
Montana	12.3	7.7	0.4	0.1	4.1
Nevada	63.2	37.2	2.2	4.3	19.5
Oregon	73.8	49.1	2.0	1.1	21.6
Utah	75.5	46.2	2.1	0.4	26.8
Washington	126.5	83.0	5.3	1.4	36.8
Wyoming	29.9	18.5	0.4	0.0	11.0
Pacific	**5,867.8**	**4,619.0**	**137.6**	**81.6**	**1,029.6**
California	5,790.5	4,609.2	115.8	81.1	984.4
Hawaii	77.3	9.8	21.8	0.5	45.2
U.S. TOTAL HISPANIC	**17,562.7**	**10,406.2**	**2,398.9**	**1,018.6**	**3,739.0**

Note: Individual figures may not add exactly to totals, due to rounding.

Source: Strategy Research Corporation

PERCENT DISTRIBUTION OF HISPANIC POPULATION BY NATIONALITY
UNITED STATES
BY STATE AND REGION
1985

Region/State	Total	Mexican	Puerto Rican	Cuban	Other Hispanic
Northeast	**100.0%**	**3.5%**	**56.7%**	**7.0%**	**32.8%**
Connecticut	100.0	3.1	70.5	4.6	21.8
Maine	100.0	30.2	15.1	3.8	50.9
Massachusetts	100.0	5.6	53.0	5.0	36.4
New Hampshire	100.0	19.2	21.2	3.8	55.8
New Jersey	100.0	2.8	49.0	17.1	31.1
New York	100.0	2.4	58.9	4.8	33.9
Pennsylvania	100.0	12.9	58.1	3.8	25.3
Rhode Island	100.0	7.9	21.1	3.7	67.3
Vermont	100.0	17.7	11.8	2.9	67.6
Southeast	**100.0%**	**20.3%**	**11.0%**	**35.5%**	**33.2%**
Alabama	100.0	56.2	7.9	3.5	32.4
Delaware	100.0	14.7	51.6	5.3	28.4
District of Columbia	100.0	17.4	8.4	3.9	70.3
Florida	100.0	8.8	11.2	54.7	25.3
Georgia	100.0	44.3	13.3	9.3	33.1
Kentucky	100.0	51.5	11.8	2.6	34.1
Louisiana	100.0	26.8	4.4	7.3	61.5
Maryland	100.0	19.0	14.7	8.2	58.1
Mississippi	100.0	57.8	5.0	1.7	35.5
North Carolina	100.0	48.8	13.8	4.1	33.3
South Carolina	100.0	53.1	11.9	3.9	31.2
Tennessee	100.0	54.7	7.1	2.9	35.3
Virginia	100.0	30.0	12.5	5.9	51.6
West Virginia	100.0	45.8	6.1	2.3	45.8
Central	**100.0%**	**63.8%**	**15.8%**	**2.5%**	**17.9%**
Arkansas	100.0	60.0	4.1	1.2	34.7
Illinois	100.0	63.8	20.8	3.1	12.3
Indiana	100.0	65.9	14.8	2.0	17.3
Iowa	100.0	71.9	2.3	1.5	24.3
Kansas	100.0	79.2	4.2	1.4	15.2
Michigan	100.0	68.4	7.7	2.3	21.6
Minnesota	100.0	63.8	5.0	1.9	29.3
Missouri	100.0	61.5	5.2	2.7	30.6
Nebraska	100.0	76.0	2.8	1.1	20.1
North Dakota	100.0	62.9	5.7	0.0	31.4

Continued. . .

PERCENT DISTRIBUTION OF HISPANIC POPULATION BY NATIONALITY
UNITED STATES
BY STATE AND REGION
1985

(Continued)

Region/State	Total	Mexican	Puerto Rican	Cuban	Other Hispanic
Central (Cont'd)					
Ohio	100.0%	44.1%	26.5%	2.5%	26.9%
Oklahoma	100.0	65.7	5.4	1.6	27.3
South Dakota	100.0	55.2	5.3	0.0	39.5
Wisconsin	100.0	64.8	17.0	1.8	16.4
Southwest	**100.0%**	**86.4%**	**0.7%**	**0.4%**	**12.5%**
Arizona	100.0	89.6	0.9	0.3	9.2
New Mexico	100.0	47.9	0.4	0.1	51.6
Texas	100.0	92.1	0.7	0.5	6.7
Northwest	**100.0%**	**62.3%**	**2.3%**	**1.1%**	**34.3%**
Alaska	100.0	43.4	12.2	2.2	42.2
Colorado	100.0	59.9	1.3	0.5	38.3
Idaho	100.0	76.5	1.1	0.0	22.4
Montana	100.0	62.4	3.0	1.0	33.6
Nevada	100.0	58.8	3.5	6.8	30.9
Oregon	100.0	66.5	2.7	1.5	29.3
Utah	100.0	61.2	2.8	0.5	35.5
Washington	100.0	65.6	4.2	1.1	29.1
Wyoming	100.0	62.1	1.2	0.0	36.7
Pacific	**100.0%**	**78.5%**	**2.5%**	**1.4%**	**17.6%**
California	100.0	79.6	2.0	1.4	17.0
Hawaii	100.0	12.7	28.2	0.7	58.4
U.S. TOTAL HISPANIC	**100.0%**	**59.5%**	**13.7%**	**5.5%**	**21.3%**

Source: Strategy Research Corporation

D. HISPANIC POPULATION GROWTH

From 1950 to 1985 the total population of the United States grew roughly 57%, from 151.3 million persons in 1950 to 238.1 million persons today. In this same thirty-five year span the U.S. Hispanic population increased 440%, from 4.0 million in 1950 to 17.6 million in 1985.

In the five year period from the 1980 Census, the U.S. Hispanic population has increased by 20.5%, from 14.6 million to 17.6 million. In contrast, total U.S. population is projected to increase from 226.5 million persons to 238.1 million persons (+5.1%).

TOTAL U.S. POPULATION
VERSUS
U.S. HISPANIC POPULATION
1950 - 1985

	Total U.S. (In Millions)	U.S. Hispanics (In Millions)
1950	151.3	4.0
1960	179.3	6.9
1970	203.2	9.0
1980	226.5	14.6
1985	238.1	17.6

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

In the decade period 1970 - 1980, every geographic region recorded substantial population growth. The Northeast region, however, recorded considerable growth (115.5%), primarily in the New York Metropolitan Area. The Southeast Region also recorded substantial growth (87.1%).

In the five year period 1980 - 1985, the Pacific Region (California and Hawaii) increased in Hispanic population by 27.2%, or 1,255,100 persons. The Southwest Region also registers an increase in Hispanic population of 26.2% (1,022,600 persons).

The Central states, meanwhile, showed the least increase in population (6.7%).

U.S. HISPANIC POPULATION
BY REGIONS
1970, 1980, 1985

Region	U.S. Hispanic Population 1970 (0000	U.S. Hispanic Population 1980 (000)	U.S. Hispanic Population 1985 (000)	Growth 1970 - 1980 (000)	Growth 1970 - 1980 (Percent)	Growth 1980 - 1985 (000)	Growth 1980 - 1985 (Percent)
Northeast	1,210.5	2,608.2	2,841.0	1,397.7	115.5%	232.8	8.9%
Southeast	754.0	1,411.0	1,682.9	657.0	87.1	271.9	19.3
Central	894.3	1,344.3	1,434.8	450.5	50.3	90.0	6.7
Southwest	2,800.5	3,903.8	4,926.4	1,103.3	39.4	1,022.6	26.2
Northwest	515.9	732.2	809.8	207.3	40.2	86.6	12.0
Pacific	3,115.8	4,612.7	5,867.8	1,496.9	48.0	1,255.1	27.2
TOTAL	9,072.6*	14,603.7	17,562.7	5,531.1	61.0%	2,959.0	20.3%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

* The 1970 total Hispanic population (9,072.6) is the "Spanish Origin" population as taken from Census Report PC(2)-1C, Persons of Spanish Origin. This population was determined via a closed-ended, self-classification question. Some of the limitations involving this method include:

1. Inconsistent classification of "no answers" - in the Southwest, for example, if the entry was missing, but the person had a Spanish surname, Mexican origin was assumed.

2. Misunderstanding - some respondents interpreted the category "Central or South American" to mean Central or Southern United States; suggesting substantial overstatement in these areas.

3. Inclusion of Portuguese origin persons - some Brazilian origin residents may have reported Central or South American origin, and therefore, were classified as Spanish origin.

The 1970 Census used three other identifiers of the Spanish population: birthplace, surname (Southwest only) and language spoken.

In an effort to better estimate the 1970 Hispanic figure, Strategy Research Corporation has compiled its own 1970 county-by-county Hispanic population for the entire U.S., utilizing the following sources:

1. For counties in Arizona, California, Colorado, New Mexico and Texas; the Census Report PC(2)-1D, Persons of Spanish Surname was used.

2. For the remaining state/county totals, the County and City Data Book, 1972 was used. In this source, the Spanish identifier was persons of Puerto Rican birth or parentage (for New York, New Jersey and Pennsylvania) and persons of Spanish language (for the remaining 42 states and D.C.).

3. The County and City Data Book does not report Spanish populations for counties with less than 400 Hispanic residents. For these counties, Strategy Research Corporation included its own 1970 Spanish population estimates.

The above table includes the 1970 Hispanic population by region from this Strategy Research Corporation compilation. The Spanish population figure utilizing this source differs somewhat from the 1970 "Spanish Origin" population as recorded by the Census Bureau (9,291.0 versus 9,072.6, respectively).

E. HISPANIC VERSUS TOTAL U.S. POPULATION BY REGION AND STATE

Of the total U.S. population comprising the Southwest, 23.6% are of Hispanic origin or descent.

Meanwhile, 21.9% of the population in the Pacific States are of Hispanic ancestry.

Although the Central Region constitutes the largest overall population of the U.S. (65.2 million persons), it represents the smallest percentage of Hispanic population (2.2%).

1985
TOTAL U.S. POPULATION VERSUS U.S. HISPANIC POPULATION BY GEOGRAPHIC REGION

Region	Total Population (000)	Hispanic Population (000)	Hispanic Percent Of Total
Northeast	49,819.6	2,841.0	5.7%
Southeast	59,451.3	1,682.9	2.8
Central	65,195.8	1,434.8	2.2
Southwest	20,893.1	4,926.4	23.6
Northwest	15,888.4	809.8	5.1
Pacific	26,840.0	5,867.8	21.9
TOTAL	238,088.2	17,562.7	7.4%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Hispanics constitute 22.5% of the population in California, the nation's most populous state, and 23.4% in Texas, the third most populous state.

Meanwhile, Hispanics make up 9.8% of the population in New York, the second most populous state.

New Mexico's population has the highest proportion of Hispanics (36.8%) and they comprise 18.2% of Arizona's population and 11.5% in Colorado.

UNITED STATES
TOTAL VERSUS HISPANIC POPULATION
BY STATE
1985

State	Total (000)	Hispanic (000)	Hispanic Percent Of Total
Alabama	4,015.9	33.4	0.8%
Alaska	518.2	12.3	2.4
Arizona	3,102.3	563.8	18.2
Arkansas	2,369.3	17.6	0.7
California	25,786.8	5,790.5	22.5
Colorado	3,263.5	374.1	11.5
Connecticut	3,140.1	136.9	4.4
Delaware	611.6	10.5	1.7
District of Columbia	613.7	17.6	2.9
Florida	11,099.4	1,081.9	9.7
Georgia	5,861.1	68.5	1.2
Hawaii	1,053.2	77.3	7.3
Idaho	1,019.8	42.2	4.1
Illinois	11,529.1	681.4	5.9
Indiana	5,542.5	89.6	1.6
Iowa	2,939.3	28.1	1.0
Kansas	2,449.1	68.5	2.8
Kentucky	3,779.8	31.6	0.8
Louisiana	4,554.8	105.4	2.3
Maine	1,161.6	5.3	0.5
Maryland	4,359.9	70.3	1.6
Massachusetts	5,779.7	152.8	2.6
Michigan	9,135.6	173.9	1.9
Minnesota	4,199.3	33.4	0.8
Mississippi	2,627.8	28.1	1.1
Missouri	5,022.6	54.4	1.1
Montana	832.8	12.3	1.5
Nebraska	1,612.9	31.6	2.0
Nevada	932.9	63.2	6.8
New Hampshire	976.5	5.8	0.6

UNITED STATES
TOTAL VERSUS HISPANIC POPULATION
BY STATE
1985
(Continued)

State	Total (000)	Hispanic (000)	Hispanic Percent Of Total
New Jersey	7,519.5	605.9	8.1%
New Mexico	1,447.0	532.1	36.8
New York	17,815.2	1,744.1	9.8
North Carolina	6,182.5	59.7	1.0
North Dakota	696.2	4.3	0.6
Ohio	10,774.3	119.4	1.1
Oklahoma	3,426.9	66.7	2.0
Oregon	2,694.5	73.8	2.7
Pennsylvania	11,937.2	166.8	1.4
Rhode Island	956.6	19.8	2.1
South Carolina	3,352.7	35.1	1.0
South Dakota	710.4	4.4	0.6
Tennessee	4,758.0	40.4	0.8
Texas	16,343.8	3,830.5	23.4
Utah	1,690.2	75.5	4.5
Vermont	533.2	3.6	0.7
Virginia	5,651.4	87.8	1.5
Washington	4,406.2	126.5	2.9
West Virginia	1,982.7	12.6	0.6
Wisconsin	4,788.3	61.5	1.3
Wyoming	530.3	29.9	5.6
TOTAL	238,088.2	17,562.7	7.4%

Source: Strategy Research Corporation

F. AGE/SEX DISTRIBUTION

In 1985, the median age for the Hispanic population is 23.6.

Slightly more than one-fourth (25.2%) of all U.S. Hispanics are children under the age of twelve, while teens (12 - 17 years of age) constitute approximately 12% of the U.S. Hispanic population.

The youthfulness of the Hispanic population is due to both the relatively high fertility and heavy immigration of young adults. The relatively large proportion of Hispanic children reflects both the larger than average family sizes of Hispanics and the fact that a substantial proportion of immigrants are in the prime child-bearing ages. According to the Immigration and Naturalization Service, in the last half of the 1970's, more than one-third of legal immigrants from Spanish-speaking countries were aged 20 - 34, and this is undoubtedly also true of illegal immigrants.

U.S. HISPANIC MARKET
AGE/SEX DISTRIBUTION
1985

	U.S. Hispanic Population (000)		Percent Distribution	
Males 18 - 34	2,921.1		16.6%	
Males 35 - 49	1,335.2		7.6	
Males 50 - 64	735.5		4.2	
Males 65+	421.0		2.4	
Males 18+		5,412.8		30.8%
Females 18 - 34	2,810.6		16.0	
Females 35 - 49	1,413.7		8.0	
Females 50 - 64	874.1		5.0	
Females 65+	500.3		2.9	
Females 18+		5,598.7		31.9
Teens (12 - 17)	2,124.1		12.1	
Children (0-11)	4,427.1		25.2	
TOTAL	17,562.7		100.0%	
MEDIAN AGE		23.6		

Source: Strategy Research Corporation

Relative youthfulness and large proportions of children are also evident for the Mexican, Puerto Rican and "Other Spanish" populations. Mexican-Americans have the highest fertility of all Hispanic groups, and are the youngest, as evidenced by their median age of 21.8 years.

The median age for Cubans, however, is radically different. The higher median age for Cubans (37.5 years) compared to the other groups, reflects, mainly, the older ages of Cuban immigrants.

1980
U.S. HISPANIC MARKET
MEDIAN AGE
BY TYPE OF HISPANIC ORIGIN

	Median Age
Total Spanish Origin	23.2
Mexican Origin	21.8
Puerto Rican Origin	22.3
Cuban Origin	37.5
Other Spanish Origin	25.6
U.S. Total	30.0

G. HOUSEHOLD SIZE

Although one and two person households have become the norm in the United States, this does not hold true for U.S. Hispanic households which have historically been larger, on the average, than non-Hispanic households.

For example, the 1970 Census recorded Hispanic average household size at 3.9, while the overall U.S. average was 3.1. During the seventies the Hispanic average declined slightly to 3.7, while the nationwide figure (all ethnic/nationality/cultural groups) declined to 2.8.

The following table shows estimated 1985 household size characteristics for the nation as a whole, the Hispanic population and the major Hispanic nationalities.

HOUSEHOLD SIZE BY TYPE (NATIONALITY) OF HISPANIC ORIGIN
U.S. HISPANIC MARKET
1985

Household Size	Total U.S. Hispanic	Mexican Origin	Puerto Rican Origin	Cuban Origin	Other Hispanic Origin	Total All U.S. Households
Number of Households (000)	4,763.9	2,738.5	648.4	308.7	1,068.3	85,031.5
1 - 2 Persons	24.7%	22.4%	25.6%	34.3%	29.6%	53.8%
3 Persons	23.7	21.5	22.0	24.8	27.8	17.3
4 Persons	23.8	24.3	24.1	16.8	21.2	15.4
5 Persons	14.8	16.6	17.4	16.6	10.8	7.9
6 Persons	7.3	8.8	5.6	3.9	5.4	3.4
7 Persons +	5.7	6.4	5.3	3.6	5.2	2.2
Mean No. Of Persons	3.7	3.9	3.7	3.3	3.5	2.7

Source: Strategy Research Corporation

All of the Hispanic nationality groups recorded average household sizes in excess of the overall U.S. average, led by Mexicans with an average household size of 3.9.

Survey Research work conducted by Strategy Research Corporation indicates that California Hispanics register the largest average household size with an average of 3.91 persons.

1984
U.S. HISPANIC MARKET
AVERAGE HOUSEHOLD SIZE BY MARKET AREA

	Average Household Size
Total U.S. Hispanic	3.92
New York	3.64
Florida	2.99
California	3.91
Texas/Southwest	3.78

Meanwhile, Hispanics in Florida record the smallest household size (2.99).

H. MEDIAN INCOME

Although the U.S. Hispanic median family income in 1985 is estimated to be below the overall U.S. median income figure ($19,900 versus $28,400) the fact is that U.S. Hispanic families are the most financially secure among the world's Hispanics.

MEDIAN FAMILY INCOME, BY TYPE OF HISPANIC ORIGIN
U.S. HISPANIC MARKET
1978, 1980, 1982 AND 1985

	1978	1980	1982	1985
U.S. Total Population	$16,786	$19,917	$23,433	$28,400
Total Hispanic Origin	$11,421	$14,712	$16,228	$19,900
Mexican	11,742	14,765	16,399	20,200
Puerto Rican	7,972	10,734	11,148	14,200
Cuban	N.A.	18,245	18,883	24,400
Other Hispanic	13,514	16,230	19,069	23,000

N.A. = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

By region, Hispanics in the Southeast earn the most ($24,100), and those residing in the Northeast earn the least ($14,400). The Southwest ($19,500) comes closest to the national Hispanic median of $19,900. Based on regional concentrations of origin groups, this is consistent with the preceeding table showing median family income by type of Hispanic origin.

HISPANIC MEDIAN FAMILY INCOME BY MAJOR HISPANIC REGION
1985

Region	Median Family Income
TOTAL U.S. HISPANIC	**$19,900**
Northeast	$14,400
Southeast	24,100
Central	20,600
Southwest	19,500
Northwest	22,000
Pacific	21,300

Source: Strategy Research Corporation

Income and Expenditures are discussed in further detail in Section VI.

I. EDUCATION

By 1985, an estimated 45.4% of U.S. Hispanic males 25 years of age and over, will have completed four years of high school or more. This compares with 67.3% of all U.S. males 25 and over.

Among females, the comparable figures are 42.7% for Hispanics and 65.8% for all U.S. females 25 and over.

Educational attainment for both males and females is significantly higher among Cubans than Other Hispanics. These data reflect, and serve to complement, the family income by Hispanic nationality figures presented in the preceding section.

YEARS OF SCHOOL COMPLETED BY PERSONS OF HISPANIC ORIGIN 25 YEARS OLD AND OVER 1985

	Total United States	Total Hispanic Origin	Mexican Origin	Puerto Rican Origin	Cuban Origin	Other Hispanic Origin
Total Population All Ages (000)	238,088.2	17,562.7	10,406.2	2,398.9	1,018.6	3,739.0
Males 25 Years & Over (000)	65,712.3	3,904.4	2,226.9	494.2	304.6	878.7
Males 25 Years & Over (Percent)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Elementary						
0 to 4 Years	3.9	15.2	20.0	12.0	6.6	7.5
5 to 7 Years	6.8	16.2	18.7	14.6	16.3	10.8
8 Years	7.8	7.7	7.3	9.7	9.7	7.1
High School						
1 to 3 Years	14.2	15.5	15.2	22.4	9.8	14.3
4 Years	31.1	22.6	20.6	24.0	22.8	26.6
College						
1 to 3 Years	16.1	13.4	12.1	10.8	15.1	17.8
4+ Years	20.1	9.4	6.1	6.5	19.7	15.9
Percent High School Graduates	67.3%	45.4%	38.9%	41.3%	57.7%	60.2%

Continued. . .

YEARS OF SCHOOL COMPLETED BY PERSONS OF HISPANIC ORIGIN 25 YEARS OLD AND OVER

1985

(Continued)

	Total United States	Total Hispanic Origin	Mexican Origin	Puerto Rican Origin	Cuban Origin	Other Hispanic Origin
Females 25 Years & Over (000)	74,054.4	4,204.5	2,237.3	570.9	360.6	1,035.7
Females 25 Years & Over (Percent)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Elementary						
0 to 4 Years	3.3	15.8	20.2	16.0	7.9	9.0
5 to 7 Years	6.5	17.1	19.2	15.6	18.8	12.7
8 Years	8.2	8.4	8.0	9.0	10.8	8.0
High School						
1 to 3 Years	16.2	16.1	16.3	20.3	9.2	15.3
4 Years	37.7	26.0	23.8	25.1	27.1	30.9
College						
1 to 3 Years	15.3	10.6	8.8	9.2	13.0	14.6
4+ Years	12.8	6.0	3.7	4.8	13.2	9.5
Percent High School Graduates	65.8%	42.7%	36.3%	39.1%	53.3%	54.9%
Memo: Percent of Total Population:						
Males 25 Years & Over	27.6%	22.2%	21.4%	20.6%	29.9%	23.5%
Females 25 Years & Over	31.1%	23.9%	21.5%	23.8%	35.4%	27.7%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

J. EMPLOYMENT

The following table provides 1985 estimates of employment by occupational category for employed U.S. Hispanics 16 years of age and older. The figures are broken shown by sex and Hispanic nationality.

EMPLOYMENT BY OCCUPATIONAL GROUP
U.S. HISPANICS BY SEX AND TYPE OF HISPANIC ORIGIN
1985

	Total Hispanic Origin	Mexican Origin	Puerto Rican Origin	Cuban Origin	Other Hispanic Origin
Total Population - All Ages	17,562.7	10,406.2	2,398.9	1,018.6	3,739.0
Total Persons 16 Years & Over	11,587.8	6,597.5	1,537.7	835.3	2,617.3
Employed Persons 16 Years & Over	6,573.2	3,780.4	715.0	517.9	1,559.9
Employed Females 16 Years & Over	2,616.9	1,417.7	280.3	229.4	689.5
Employed Males 16 Years & Over	3,956.3	2,362.7	434.7	288.5	870.4
Percent Distribution By Occupational Group					
Employed Persons 16 Years & Over	100.0%	100.0%	100.0%	100.0%	100.0%
Managerial And Professional	12.2	9.6	12.2	19.4	16.4
Technical, Sales, Administrative Support	24.5	21.7	27.7	31.8	27.5
Service	16.3	16.2	16.5	12.4	17.6
Farming, Forestry and Fishing	4.7	6.9	1.5	0.9	1.9
Precision Production, Craft & Repair	14.0	15.2	11.2	12.4	12.9
Operators, Fabricators & Laborers	28.3	30.4	30.9	23.1	23.7
Employed Females 16 Years & Over	100.0%	100.0%	100.0%	100.0%	100.0%
Managerial And Professional	12.5	10.8	13.4	15.7	14.8
Technical, Sales, Administrative Support	39.0	37.5	42.0	42.8	39.4
Service	20.8	22.8	15.2	12.4	21.6
Farming, Forestry & Fishing	1.8	2.9	0.4	0.3	0.6
Precision Production, Craft & Repair	3.9	4.0	3.5	4.4	3.7
Operators, Fabricators & Laborers	22.0	22.0	25.5	24.4	19.9

Continued. . .

EMPLOYMENT BY OCCUPATIONAL GROUP
U.S. HISPANICS BY SEX AND TYPE OF HISPANIC ORIGIN
1985

(Continued)

	Total Hispanic Origin	Mexican Origin	Puerto Rican Origin	Cuban Origin	Other Hispanic Origin
Employed Males 16 Years & Over	100.0%	100.0%	100.0%	100.0%	100.0%
Managerial And Professional	12.0	9.0	11.4	22.3	17.6
Technical, Sales, Administrative Support	14.9	12.2	18.6	23.1	18.1
Service	13.3	12.2	17.4	12.4	14.5
Farming, Forestry & Fishing	6.5	9.2	2.2	1.4	2.9
Precision Production, Craft & Repair	20.7	21.9	16.1	18.7	20.1
Operators, Fabricators & Laborers	32.6	35.5	34.3	22.1	26.8
Memo: Total Persons 16 Years & Over As A Percent Of Total Population	65.9%	63.4%	64.1%	82.0%	70.0%
Memo: Employed Persons 16 Years & Over As A Percent Of Total Persons 16 Years And Over	56.7%	57.3%	46.5%	62.0%	59.6%
Memo: Employed Females 16 Years & Over As A Percent Of Employed Persons 16 Years And Over	39.7%	37.5%	39.2%	44.3%	44.2%
Memo: Employed Males 16 Years & Over As A Percent Of Employed Persons 16 Years And Over	60.3%	62.5%	60.8%	55.7%	55.8%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Overall, Hispanics are clustered in blue-collar and semi-skilled jobs in fields such as construction and manufacturing that suffer high seasonal or cyclical unemployment.

As the prior discussions of educational attainment and family income would suggest, Cubans and Other Hispanics record the highest percentages among the Hispanic nationalities in the professional, technical and administrative occupations.

The statistics of employment as a percent of working age population are also led by Cubans and Other Hispanics. This is due to the higher incidence of working women in these nationality groups as their male percentages actually were below the overall Hispanic average and the percentages recorded by Mexican and Puerto Rican males.

K. URBAN/RURAL AND METROPOLITAN/NON-METROPOLITAN RESIDENCE

The Census Bureau provides the following definitions of Urbanized Areas and Standard Metropolitan Statistical Areas. For purposes of this analysis, areas outside Urbanized Areas are Rural and areas not included within Standard Metropolitan Statistical Areas are Non-Metropolitan.

Definition Of Urbanized Areas

The major objective of the Census Bureau in delineating urbanized areas is to provide a better separation of urban and rural population and housing in the vicinity of large cities. An urbanized area consists of a central city or cities and surrounding closely settled territory or "urban fringe".

There are 366 urbanized areas delineated in the United States for the 1980 census. There are seven urbanized areas delineated in Puerto Rico.

The following criteria are used in determining the eligibility and definition of the 1980 urbanized areas.

An urbanized area comprises an incorporated place and adjacent densely settled surrounding area that together have a minimum population of 50,000 (the rural portions of extended cities, as defined in the Census Bureau's extended city criteria, are excluded from the urbanized area. In addition, for an urbanized area to be recognized, it must include a population of at least 25,000 that does not reside on a military base). The densely settled surrounding area consists of:

1. Contiguous incorporated places or census designated places having:
    a. A population of 2,500 or more; or,
    b. A population of fewer than 2,500 but having either a population density of 1,000 persons per square mile, a closely settled area containing a minimum of 50 percent of the population, or a cluster of at least 100 housing units.
2. Contiguous unincorporated area which is connected by road and has a population density of at least 1,000 persons per square mile.
3. Other contiguous unincorporated area with a density of less than 1,000 persons per square mile, provided that it:
    a. Eliminates an enclave of less than 5 square miles which is surrounded by built-up area.
    b. Closes an indentation in the boundary of the densely settled area that is no more than 1 mile across the open end and encompasses no more than 5 square miles.

c. Links an outlying area of qualifying density, provided that the outlying area is:
   (1) Connected by road to, and is not more than 1½ miles from, the main body of the urbanized area.
   (2) Separated from the main body of the urbanized area by water or other undeveloped area, is connected by road to the main body of the urbanized area, and is not more than 5 miles from the main body of the urbanized area.

4. Large concentrations of nonresidential urban area (such as industrial parks, office areas, and major airports), which have at least one-quarter of their boundary contiguous to an urbanized area.

Definition Of Standard Metropolitan Statistical Areas

The general concept of a metropolitan area is one of a large population nucleus, together with adjacent communities which have a high degree of economic and social integration with that nucleus. The standard metropolitan statistical area (SMSA) classification is a statistical standard, developed for use by Federal agencies in the production, analysis, and publication of data on metropolitan areas. The SMSA's are designated and defined by the Office of Management and Budget, following a set of official published standards developed by the interagency Federal Committee on Standard Metropolitan Statistical Areas.

Each SMSA has one or more central counties containing the area's main population concentration: an urbanized area with at least 50,000 inhabitants. An SMSA may also include outlying counties which have close economic and social relationships with the central counties. The outlying counties must have a specified level of commuting to the central counties and must also meet certain standards regarding metropolitan character, such as population growth. In New England, SMSA's are composed of cities and towns rather than whole counties.

There are 318 SMSA's designated in the United States for the 1980 census. There are five SMSA's designated in Puerto Rico.

The population living in SMSA's may also be referred to as the metropolitan population. This population is subdivided into "inside central city (or cities)" and "outside central city (or cities)". The population living outside SMSA's constitutes the non-metropolitan population.

The following table shows the projected 1985 population, the Hispanic population and the Hispanic nationality groups according to urban/rural and metropolitan/non-metropolitan residence.

The data show the Hispanic population characterized as urban and metropolitan to a significantly greater degree than the general population. This is especially true of the Puerto Ricans and Cubans.

U.S. HISPANIC POPULATION BY URBAN/RURAL AND METROPOLITAN/NON-METROPOLITAN PLACE OF RESIDENCE BY TYPE OF HISPANIC ORIGIN: 1985

	Total U.S. Population	Total Hispanic Origin	Mexican Origin	Puerto Rican Origin	Cuban Origin	Other Hispanic Origin
Number (000)						
Total	238,088.2	17,562.7	10,406.2	2,398.9	1,018.6	3,739.0
Urban	175,471.0	15,830.5	9,126.2	2,350.9	1,003.3	3,350.1
Rural	62,617.2	1,732.2	1,280.0	48.0	15.3	388.9
Metropolitan	178,090.0	15,427.6	8,845.3	2,346.1	998.2	3,238.0
Non-Metropolitan	59,998.2	2,135.1	1,560.9	52.8	20.4	501.0
Percent Distribution						
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Urban	73.7	90.1	87.7	98.0	98.5	89.6
Rural	26.3	9.9	12.3	2.0	1.5	10.4
Metropolitan	74.8	87.8	85.0	97.8	98.0	86.6
Non-Metropolitan	25.2	12.2	15.0	2.2	2.0	13.4

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Hispanics are a highly urban population. Fully 90% of all U.S. Hispanics live in urban areas compared to 74% of the general population. Moreover, 88% of U.S. Hispanics live in metropolitan areas. This compares to 75% of the general population who live in metropolitan areas.

IV. LIFESTYLE AND LANGUAGE

IV. LIFESTYLE AND LANGUAGE

This section of the report will explore various characteristics of Hispanics in the major U.S. markets.

In order to provide meaningful insight into the patterns of language use, shopping preferences, as well as other consumer characteristics, Hispanics in the Southwest (including Texas), New York, Florida and California were interviewed by Strategy Research Corporation.

A. LANGUAGE PATTERNS

All U.S. Hispanic respondents interviewed were asked a series of questions dealing with their use of both the Spanish and English language.

The following table summarizes "Very Good" responses for language use under varying conditions.

Language Use	"Very Good" Response Percent
How Well Spanish Is Spoken	55.6%
How Well English Is Spoken	18.2
How Well Spanish Is Written	44.8
How Well English Is Written	17.8
How Well Spanish Is Read	49.2
How Well English Is Read	19.6

1. First Language Learned To Speak

The Hispanics interviewed were asked what the first language was they learned to speak. At least nine out of every ten Hispanics in each market surveyed stated that the first language they learned to speak was Spanish.

1984
U.S. HISPANIC MARKET
FIRST LANGUAGE LEARNED TO SPEAK
BY MARKET AREA

	Total	New York	Florida	California	Texas/ South-West
Spanish	93.1%	95.2%	95.3%	90.5%	94.0%
English	6.9	4.8	4.7	9.5	6.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Overall, English was the first language spoken by 6.9% of the respondents interviewed.

By Country Of Origin

By country of origin, at least nine out of every ten Hispanics, regardless of origin, stated that the first language they learned to speak was Spanish, with the highest response rate for Hispanics whose country of origin is Central/South America.

1984
U.S. HISPANIC MARKET
FIRST LANGUAGE LEARNED TO SPEAK
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Central/ South America
Spanish	97.9%	90.5%	92.4%	98.7%
English	2.1	9.5	7.6	1.3
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

By Age

By age group, nine out of every ten Hispanics interviewed also indicated that the first language they learned to speak was Spanish, with the 35 to 49 group registering a slightly higher incidence of learning Spanish first.

U.S. HISPANIC MARKET
FIRST LANGUAGE LEARNED TO SPEAK
BY AGE GROUP

	Total 18+	18-34	35-49
Spanish	93.1%	91.9%	94.3%
English	6.9	8.1	5.7
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

2. Ability To Speak Spanish/English

a. Spanish

When asked how well they spoke Spanish, 84.1% of the total sample stated that they spoke the language "Very Good/Good".

1984
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING SPANISH
BY MARKET AREA

	Total	New York	Florida	California	Texas/ South-West
Very Good/Good	84.1%	93.0%	94.0%	78.2%	68.0%
Fair/Poor/Very Poor	15.3	7.0	5.7	20.5	32.0
Can't Speak Spanish	0.6	0.0	0.3	1.3	0.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Proficiency in the use of the Spanish language is greatest in the New York and Florida areas. In Texas/Southwest and California, however, some of the Hispanics interviewed felt that their fluency of the Spanish language is not as good as it could be ("Fair/Poor/Very Poor").

By Country Of Origin

The largest proportion of Hispanics who speak Spanish "Very Good/Good" are those from Central/South America.

1984
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING SPANISH
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Central/ South America
Very Good/Good	93.6%	78.1%	91.0%	94.0%
Fair/Poor/Very Poor	6.4	20.0	9.0	6.0
Can't Speak Spanish	0.0	1.9	0.0	0.0
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

By Age

As age increases, so does the proportion of Hispanics who speak Spanish "Very Good/Good" (90.0% for the 35 to 49 age group).

1984
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING SPANISH
BY AGE GROUP

	Total 18+	18-34	35-49
Very Good/Good	84.1%	80.0%	90.0%
Fair/Poor/Very Poor	15.3	19.1	9.7
Can't Speak Spanish	0.6	0.9	0.3
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

b. English

In addition to Spanish, respondents were queried with regard to their proficiency of the English language. Here we see that overall, Spanish shows a higher level of proficiency than English, as only 40.8% of those interviewed speak English "Very Good" or "Good".

1984
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING ENGLISH
BY MARKET AREA

	Total	New York	Florida	California	Texas/ South-West
Very Good/Good	40.8%	44.7%	27.0%	43.3%	51.3%
Fair/Poor/Very Poor	41.5	42.2	39.0	44.9	32.0
Can't Speak English	17.7	13.1	34.0	11.8	16.7
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Approximately 18% of those interviewed stated that they could not speak English at all.

The highest incidence of being unable to speak English was recorded in the Florida market area. Slightly more than one-third of the surveyed respondents stated they could not speak English at all. Similarly, in Florida, slightly more than one-fourth of the Hispanics interviewed (27.0%) felt that their ability to speak English was "Very Good/Good".

Fluency of the English language is greatest in the Texas/Southwest area where over one-half of the Hispanics interviewed stated that they spoke English "Very Good/Good".

By Country Of Origin

Hispanics whose country of origin is Mexico have the highest incidence of being able to speak English "Very Good/Good" (45.6%).

1984
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING ENGLISH BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Central/ South America
Very Good/Good	28.9%	45.6%	39.4%	30.0%
Fair/Poor/Very Poor	39.9	40.3	37.9	59.0
Can't Speak English	31.2	14.1	22.7	11.0
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Meanwhile, the U.S. Hispanics interviewed who cited their country of origin as Cuba, registered the least level of fluency with regard to the English language (28.9%).

By Age

The younger the age of the respondent, the greater the likelihood of speaking English "Very Good/Good".

1984
U.S. HISPANIC MARKET
FLUENCY OF SPEAKING ENGLISH BY AGE GROUP

	Total 18+	18-34	35-49
Very Good/Good	40.8%	48.0%	34.8%
Fair/Poor/Very Poor	41.5	39.0	49.4
Can't Speak English	17.7	13.0	15.8
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

3. Ability Of Writing Spanish/English

Hispanics were also queried with regard to how well they wrote both Spanish and English.

a. Spanish

Over 73% of Hispanics can write Spanish "Very Good" or "Good". The Hispanic's ability to write Spanish is greatest in the Florida market area where nine out of every ten Hispanics are able to write Spanish "Very Good/Good".

Meanwhile, in Texas and other Southwest markets, only half of the Hispanics surveyed stated that they were able to write Spanish with any proficiency. A total of 17.3%, however, also stated that they were unable to write Spanish at all.

1981
U.S. HISPANIC MARKET
HOW WELL SPANISH IS WRITTEN
BY MARKET AREA

	Total	New York	Florida	California	Texas/ South-West
Very Good/Good	73.4%	84.3%	90.0%	64.5%	50.0%
Fair/Poor/Very Poor	20.1	11.9	9.7	27.1	32.7
Can't Write In Spanish	6.5	3.8	0.3	8.4	17.3
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

By Country Of Origin

Hispanics who stated their country of origin as Cuba have the highest incidence of writing Spanish "Very Good/Good" (90.4%).

1984
U.S. HISPANIC MARKET
HOW WELL SPANISH IS WRITTEN
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Central/ South America
Very Good/Good	90.4%	53.3%	84.9%	87.7%
Fair/Poor/Very Poor	8.5	33.0	3.0	10.9
Can't Write In Spanish	1.1	13.7	12.1	1.4
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics whose country of origin is Mexico, however, have the lowest incidence (53%) of writing Spanish "Very Good" or "Good".

By Age

Hispanics in the 35 to 49 age group have a slightly higher incidence of being able to write Spanish "Very Good/Good" than Hispanics in the 18 to 34 age group (69.6% versus 66.0%, respectively).

1984
U.S. HISPANIC MARKET
HOW WELL SPANISH IS WRITTEN
BY AGE GROUP

	Total 18+	18-34	35-49
Very Good/Good	73.4%	66.0%	69.6%
Fair/Poor/Very Poor	20.1	23.7	19.0
Can't Write In Spanish	6.5	10.3	11.4
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

b. English

When the respondents were asked how well they wrote English, over 35% rendered "Very Good/Good" responses.

The highest incidence of proficiency was recorded among Texan/Southwestern Hispanics where one-half of those surveyed stated that they could write English "Very Good/Good".

1984
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS WRITTEN
BY MARKET AREA

	Total	New York	Florida	California	Texas/ South-West
Very Good/Good	35.5%	36.1%	25.7%	36.5%	50.7%
Fair/Poor/Very Poor	38.0	40.9	34.0	42.6	22.6
Can't Write In English	26.5	23.0	40.3	20.9	26.7
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Approximately four out of every ten Hispanics in the Florida market area stated that they were unable to write in English.

By Country Of Origin

Hispanics whose country of origin is Puerto Rico have the highest incidence of being able to write English "Very Good/Good" (39.4%).

1984
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS WRITTEN
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Central/ South America
Very Good/Good	37.2%	24.7%	39.4%	27.4%
Fair/Poor/Very Poor	19.8	35.1	27.3	57.5
Can't Write In English	43.0	39.7	33.3	15.1
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

By Age

Hispanics in the 18 to 34 age group have a higher incidence of being able to write English "Very Good/Good" than Hispanics in the 35 to 49 age group (43.5% versus 36.7%, respectively).

1984
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS WRITTEN
BY AGE GROUP

	Total 18+	18-34	35-49
Very Good/Good	35.5%	43.5%	36.7%
Fair/Poor/Very Poor	38.0	38.1	47.4
Can't Write In English	26.5	18.4	15.9
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

4. Ability To Read Spanish/English

a. Spanish

Overall, more than three-fourths of the Hispanics interviewed stated that they were able to read Spanish very well.

The greatest ability to read Spanish was recorded in Florida, where at least nine out of every ten Latins cited the capability of being able to read the language very well.

1984
U.S. HISPANIC MARKET
HOW WELL SPANISH IS READ
BY MARKET AREA

	Total	New York	Florida	California	Texas/ South-West
Very Good/Good	77.7%	87.2%	92.7%	69.4%	58.0%
Fair/Poor/Very Poor	17.1	10.3	6.7	23.9	28.0
Can't Read In Spanish	5.2	2.5	0.6	6.7	14.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Incidence of reading Spanish "Very Good/Good" was lowest among Hispanics in the Texas/Southwestern markets (58.0%). In addition, 14.0% cited the inability to read Spanish at all.

By Country Of Origin

Hispanics whose country of origin is Central/South America have the highest incidence of being able to read Spanish very well or well (93.2%).

1984
U.S. HISPANIC MARKET
HOW WELL SPANISH IS READ
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Central/ South America
Very Good/Good	92.4%	62.7%	86.4%	93.2%
Fair/Poor/Very Poor	6.5	27.4	7.5	5.4
Can't Read In Spanish	1.1	9.9	6.1	1.4
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The least level of incidence (63%) among Hispanics who are able to read Spanish "Very Good/Good" was registered by those who cited Mexico as their country of origin.

By Age

Approximately 78% of Hispanics in the 35 to 49 age group are able to read Spanish very well or well.

1984
U.S. HISPANIC MARKET
HOW WELL SPANISH IS READ
BY AGE GROUP

	Total 18+	18-34	35-49
Very Good/Good	77.7%	72.2%	77.9%
Fair/Poor/Very Poor	17.1	20.2	15.8
Can't Read In Spanish	5.2	7.6	6.3
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

b. English

With regard to reading English, less than 40% of U.S. Hispanics read English "Very Well" or "Well".

The ability to read English is highest among Texas/Southwestern Hispanics, as nearly 57% stated their comprehension was "Very Good/Good". Meanwhile, 24.0% mentioned that they could not read English at all.

New York Hispanics registered the second highest level of ability to read in English, as slightly more than four out of every ten Latins interviewed felt that their ability to read English was above par ("Very Good/Good").

1984
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS READ
BY MARKET AREA

	Total	New York	Florida	California	Texas/ South-West
Very Good/Good	38.3%	40.6%	27.7%	37.8%	56.7%
Fair/Poor/Very Poor	37.9	39.0	36.6	43.1	19.3
Can't Read In English	23.8	20.4	35.7	19.1	24.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Florida Hispanics mentioned most often that they could not read the English language (35.7%). Slightly more than one-fourth (27.7%), however, stated that their ability to read English was "Very Good/Good".

By Country Of Origin

Hispanics of Mexican origin have the highest incidence (48%) of being able to read English "Very Good/Good".

1984
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS READ
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Central/ South America
Very Good/Good	29.1%	47.9%	37.9%	31.5%
Fair/Poor/Very Poor	35.4	34.6	31.8	53.4
Can't Read In English	35.5	17.5	30.3	15.1
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics of Cuban origin have the highest incidence (35%) of not being able to read English.

By Age

Approximately 47% of Hispanics in the 18 to 34 age group are able to read English "Very Good/Good" compared with 40% in the 35 to 49 age group.

1984
U.S. HISPANIC MARKET
HOW WELL ENGLISH IS READ
BY AGE GROUP

	Total 18+	18-34	35-49
Very Good/Good	38.3%	47.1%	40.5%
Fair/Poor/Very Poor	37.9	37.8	38.0
Can't Read In English	23.8	16.1	21.5
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

5. Language Spoken At Home/Work/Social Functions

In order to obtain a better overview as to their actual use of the two languages, Hispanics were asked about the language they spoke on different occasions.

The following table is a summary of the language spoken by U.S. Hispanics at various times.

1984
LANGUAGE SPOKEN
BY U.S. HISPANICS
AT VARIOUS TIMES

Language Spoken	At Home	At Work	At Social Functions
Spanish	68.2%	41.1%	52.3%
English	5.9	22.6	8.5
Both	25.9	36.3	39.2
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Spanish is spoken most frequently by Hispanics at home and least often in the work place.

While Spanish is the primary language spoken, there is much crossing over in various situations.

a. Language Spoken At Home

Overall, more than two-thirds of U.S. Latins prefer to speak Spanish in the home, while 26% speak both English and Spanish equally at home.

1984
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT HOME
BY MARKET AREA

	Total	New York	Florida	California	Texas/ South-West
Spanish	68.2%	63.6%	88.7%	57.3%	50.7%
English	5.9	6.7	1.3	6.5	11.3
Both	25.9	29.7	10.0	36.2	38.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Spanish is spoken most frequently in the home by Hispanics in Florida (88.7%) and least often by Hispanics in the Texas/Southwest markets (50.7%).

In the Texas/Southwest market area, 38.0% speak Spanish and English equally compared to 10.0% reporting so in Florida.

English was cited most often (11.3%) by Latins in Texas/Southwest as the language spoken most frequently in the home.

By Country Of Origin

Spanish is spoken most frequently in the home by Hispanics whose country of origin is Cuba (92.5%) and least often by Hispanics whose country of origin is Mexico (53.6%).

1984
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT HOME
BY COUNTRY OF ORIGIN

Language	Cuba	Mexico	Puerto Rico	Central/ South America
Spanish	92.5%	53.6%	66.7%	82.2%
English	0.0	11.4	9.1	0.0
Both	7.5	35.0	24.2	17.8
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

English was cited most often (35.0%) by Latins who cited Mexico as their country of origin.

By Age

Spanish is spoken most frequently in the home by Hispanics in the 35 to 49 age group (65.8%).

1984
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT HOME
BY AGE GROUP

Language	Total 18+	18-34	35-49
Spanish	68.2%	61.7%	65.8%
English	5.9	8.1	9.5
Both	25.9	30.2	24.7
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

b. Language Spoken At Work

With regard to the language spoken in the work environment, 41.1% said they spoke Spanish compared to 22.6% who said they spoke English most frequently. An additional 36.3% said they spoke English and Spanish equally at their work place.

1984
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT WORK*
BY MARKET AREA

Language	Total	New York	Florida	California	Texas/ South-West
Spanish	41.1%	39.1%	51.7%	39.0%	14.3%
English	22.6	28.2	16.1	12.4	41.5
Both	36.3	32.7	32.2	48.6	44.2
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

* This data excludes Hispanics who do not work.

Source: Strategy Research Corporation

The incidence of speaking only Spanish at work is highest among Hispanics in Florida (51.7%) and lowest among Hispanics in Texas and other Southwestern markets (14.3%). Conversely, English is the language spoken most by the latter group of Hispanics (41.5%).

By Country Of Origin

Spanish is spoken most frequently at work by Hispanics whose country of origin is Cuba (51.9%) and least by Hispanics whose country of origin is Puerto Rico (29.4%).

1984
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT WORK
BY COUNTRY OF ORIGIN

Language	Cuba	Mexico	Puerto Rico	Central/ South America
Spanish	51.9%	34.6%	29.4%	46.1%
English	13.9	26.8	35.3	33.8
Both	34.2	38.6	35.3	20.1
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The incidence of speaking English only at work is the highest among Latins whose country of origin is Puerto Rico (35.3%).

By Age

Overall, 41% of U.S. Hispanics 18 years of age and older speak Spanish at their place of work.

1984
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT WORK
BY AGE GROUP

Language	Total 18+	18-34	35-49
Spanish	41.1%	33.5%	38.6%
English	22.6	21.7	26.0
Both	36.3	44.8	35.4
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

At work, Hispanics in the 35 to 49 age group speak Spanish most frequently (38.6%).

e. Language Spoken At Social Functions

At social gatherings or meetings, Spanish again becomes the predominant language spoken, as 52.3% said they spoke Spanish most frequently at these social events compared to 8.5% who said they spoke English most frequently. In addition, 39.2% said they spoke English and Spanish equally at social gatherings or meetings.

1984
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT SOCIAL FUNCTIONS
BY MARKET AREA

Language	Total	New York	Florida	California	Texas/ South-West
Spanish	52.3%	47.3%	74.0%	46.2%	42.0%
English	8.5	9.3	4.0	8.9	14.0
Both	39.2	43.4	22.0	44.9	44.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

When they attend social functions, Hispanics in Florida speak Spanish most frequently (74.0%). Furthermore, Spanish and English are spoken by 22.0% on an equal basis by Florida's Hispanics.

In the other three areas, less than half of the U.S. Hispanics speak Spanish most frequently at social occasions. Similar levels of mention for Spanish/English were also recorded between markets surveyed.

By Country Of Origin

Spanish is spoken most frequently at social occasions by Hispanics whose country of origin is Cuba (71.0%), while Latins from Mexico speak Spanish the least at social functions (43.0%).

1984
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT SOCIAL FUNCTIONS
BY COUNTRY OF ORIGIN

Language	Cuba	Mexico	Puerto Rico	Central/ South America
Spanish	71.0%	43.0%	65.2%	65.8%
English	1.0	14.0	9.0	2.7
Both	28.0	43.0	25.8	31.5
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

By Age

Overall, the majority of adult Hispanics (52.3%) speak Spanish most frequently at social meetings or functions.

1984
U.S. HISPANIC MARKET
LANGUAGE SPOKEN AT SOCIAL FUNCTIONS
BY AGE GROUP

Language	Total 18+	18-34	35-49
Spanish	52.3%	48.9%	55.1%
English	8.5	11.2	10.1
Both	39.2	39.9	34.8
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics in the 35 to 49 age group speak Spanish most frequently at social functions (55.1%).

6. Language Most Comfortable Speaking

Hispanics in this survey were asked, "Thinking now about when you do arithmetic (that is, when you add, subtract, divide), or in a romantic situation, which language do you prefer (feel most comfortable with)?"

Overall, Hispanics are most comforable speaking Spanish. The use of English, however, is the chosen language by 17% of U.S. Hispanics.

Eighty percent of the New York and Florida Hispanics feel most comfortable conversing in the Spanish language, while in various Texas/Southwestern markets, less than half of the Hispanics interviewed feel most comfortable speaking Spanish.

1984
U.S. HISPANIC MARKET
LANGUAGE MOST COMFORTABLE SPEAKING
BY MARKET AREA

Language	Total	New York	Florida	California	Texas/South-West
Spanish	68.3%	79.9%	80.7%	60.9%	46.7%
English	16.8	8.9	6.3	21.4	37.3
Both	14.9	11.2	13.0	17.7	16.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics in Texas and the Southwest feel more at ease conversing in English than do Hispanics in the other major market areas surveyed.

By Country Of Origin

Hispanics who cited their country of origin as Central or South America feel most comfortable using the Spanish language (86.3%), while Latins of Mexican origin feel the least comfortable with Spanish (51.7%).

1984
U.S. HISPANIC MARKET
LANGUAGE MOST COMFORTABLE SPEAKING
BY COUNTRY OF ORIGIN

Language	Cuba	Mexico	Puerto Rico	Central/ South America
Spanish	81.7%	51.7%	78.8%	86.3%
English	7.5	31.2	16.7	2.7
Both	10.8	10.8	4.5	11.0
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Latins whose country of origin is Mexico have the highest incidence of being most comfortable with the English language (31.2%).

By Age

Hispanics in the 35 to 49 age group feel most comfortable speaking the Spanish language (63.3%).

1984
U.S. HISPANIC MARKET
LANGUAGE MOST COMFORTABLE SPEAKING
BY AGE GROUP

Language	Total 18+	18-34	35-49
Spanish	68.3%	60.5%	63.3%
English	16.8	24.7	23.4
Both	14.9	14.8	13.3
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

7. Understanding Each Other As Hispanics

Although Spanish is the common language among different Hispanic groups, differences still exist in cultural dialects. Thus, Mexicans, Cubans, Puerto Ricans, Dominicans, etc., were asked whether they have difficulty communicating with one another.

Overall, feelings are mixed. Almost one-half of all Latins interviewed feel that Hispanics of different origins do have difficulty understanding one another, while approximately one-half feel that a communication barrier does not exist.

1984
U.S. HISPANIC MARKET
HISPANICS OF DIFFERENT ORIGINS
HAVING TROUBLE UNDERSTANDING EACH OTHER

	Total	New York	Florida	California	Texas/ South-West
No	48.4%	43.1%	58.3%	44.4%	54.7%
Yes	51.6	56.9	41.7	55.6	45.3
Somewhat	17.9	13.4	23.3	19.3	11.3
A Little	16.9	25.2	9.3	15.4	20.0
A Lot	16.8	18.3	9.1	20.9	14.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

It is felt by Hispanics in Florida, more so than in the other markets surveyed, that a communication problem does not really exist. Of those with contrary belief, the problem is not felt to be that severe.

By Country Of Origin

Hispanics of Cuban origin have the least difficulty understanding other Hispanics (65.6%), while Latins of Central or South American origin have the most trouble understanding other Hispanics (65.8%).

1984
U.S. HISPANIC MARKET
HISPANICS OF DIFFERENT ORIGINS HAVING TROUBLE UNDERSTANDING EACH OTHER
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Central/ South America
No	65.6%	46.4%	50.0%	34.2%
Yes	34.4	53.6	50.0	65.8
Somewhat	19.4	13.7	7.6	13.7
A Little	5.4	19.4	27.2	19.2
A Lot	9.6	20.5	15.2	32.9
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

By Age

Overall, the majority of U.S. Hispanics (51.6%) do feel that a problem exists in communicating with Hispanics of different nationalities. Among those who believe so, 17% feel that the problem is somewhat severe.

1984
U.S. HISPANIC MARKET
HISPANICS OF DIFFERENT ORIGINS HAVING TROUBLE UNDERSTANDING EACH OTHER BY AGE GROUP

	Total 18+	18-34	35-49
No	48.4%	46.2%	51.3%
Yes	51.6	53.8	48.7
Somewhat	17.9	10.8	14.5
A Little	16.9	21.5	17.1
A Lot	16.8	21.5	17.1
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics 35 to 49 years of age have the least trouble understanding other Latins (51.3%).

B. SHOPPING PREFERENCES

In order to better understand the Hispanic consumer's attitudes toward Latin versus Anglo-oriented retail outlets, Hispanics in New York, Florida, California, Texas and the Southwest were asked to rate (on a ten point scale) the importance to them of the following when shopping:

- Spanish speaking employees
- English speaking employees
- Latin-origin employees
- Spanish store signs/advertisements
- That a store sell products that Latins like

Overall, it is very important to the Hispanic that the store in which he/she shops sells products geared toward Hispanic tastes. On the other hand, Latins place the least amount of importance on the fact that the employees speak English.

1984
U.S. HISPANIC MARKET
IMPORTANCE TO LATINS OF SALES PEOPLE AND STORES
BY MARKET AREA
WEIGHTED AVERAGES

	Total	New York	Florida	California	Texas/ South-West
Sales People Speak Spanish	7.31	6.93	8.23	7.18	6.76
Sales People Speak English	5.63	5.23	5.33	6.15	6.83
Sales People Be Latins	7.09	6.83	7.88	6.98	6.50
Signs/Ads In Store Be In Spanish	7.18	6.73	8.03	7.16	6.51
Stores Sell Products Geared To Hispanic Taste	7.93	7.95	8.48	7.82	7.21

1 = Very Unimportant
10 = Very Important

Source: Strategy Research Corporation

In Florida, more so than in the other Hispanic markets, more importance is placed on store personnel that are Latins and who speak Spanish. Furthermore, it is very important to Florida Hispanic consumers that store signs/ads are in Spanish (8.03 mean average).

By Country Of Origin

For Latins, no matter what their country of origin, it is very important that the stores in which they shop sell products geared to Hispanic tastes.

Latins, regardless of their country of origin, place the least amount of importance on the fact that the store employees speak English.

1984
U.S. HISPANIC MARKET
IMPORTANCE TO LATINS OF SALES PEOPLE AND STORES
BY COUNTRY OF ORIGIN
WEIGHTED AVERAGES

	Cuba	Mexico	Puerto Rico	Central/ South America
Sales People Speak Spanish	7.25	6.67	7.30	7.67
Sales People Speak English	3.82	5.85	5.24	4.95
Sales People Be Latins	6.46	6.18	6.44	7.30
Signs/Ads In Store Be In Spanish	7.20	6.02	6.23	7.27
Stores Sell Products Geared To Hispanic Taste	7.70	6.86	7.74	8.34

1 = Very Unimportant
10 = Very Important

Source: Strategy Research Corporation

Latins who gave their country of origin as Central or South America place more importance on store personnel that are Latins and who speak Spanish, and that store signs/ads are in Spanish.

By Age

Among Latins in the older age group (35 to 49), it is very important that the store in which they shop sell products geared to Hispanic tastes and that sales people speak Spanish (7.57 and 7.23 mean average scores, respectively).

1984
U.S. HISPANIC MARKET
IMPORTANCE TO LATINS OF SALES PEOPLE AND STORES
BY AGE GROUPS
WEIGHTED AVERAGES

	Total 18+	18-34	35-49
Sales People Speak Spanish	7.31	6.79	7.23
Sales People Speak English	5.63	5.48	5.41
Sales People Be Latins	7.09	6.31	6.59
Signs/Ads In Store Be In Spanish	7.18	6.41	6.47
Stores Sell Products Geared To Hispanic Taste	7.93	7.17	7.57

1 = Very Unimportant
10 = Very Important

Source: Strategy Research Corporation

C. TELEPHONE OWNERSHIP

Ninety-two percent of the Hispanic households within the Miami ADI have telephones, the highest incidence among the ADIs surveyed. Thirty-eight percent of Miami Hispanic households have unlisted numbers.

San Antonio also records a higher level of telephone ownership (87%). A total of 43% of the area's phones have published numbers, while 44% of the Hispanic households have unlisted phone numbers.

In the Salinas ADI, 46% of the households surveyed had no telephones and 29% of the households had unlisted numbers.

1984
U.S. HISPANIC MARKET
TELEPHONE OWNERSHIP STATUS

	Hispanic Households		
ADI	Without Phone	With Unlisted Phone	With Listed Phone
Corpus Christi	26%	27%	47%
Fresno	31	31	38
Los Angeles	40	42	18
Miami	8	38	54
New York	44	42	14
Phoenix	39	32	29
Sacramento	24	33	43
Salinas	46	29	25
San Antonio	13	44	43
San Francisco	22	42	36
TOTAL U.S. HISPANICS	32%	37%	31%

Source: Strategy Research Corporation
"Spanish Television Audience Research"

In addition to Salinas, the New York and Los Angeles ADIs also recorded somewhat high percentages of homes without telephones (44% and 40%, respectively).

V. MEDIA HABITS

V. MEDIA HABITS

The U.S. Hispanic Market is one of the fastest growing special markets and, therefore, of great interest to many marketers of products and services. In this regard, various forms of media (radio, television, print) are utilized to reach this population segment.

A. LISTENING/VIEWING/READERSHIP HABITS

Overall, slightly more than two-thirds of all U.S. Hispanics interviewed by Strategy Research Corporation stated that they watched Spanish language television yesterday. Meanwhile, nearly one-half (47.3%) also mentioned listening to Spanish language radio stations. The reading of Spanish newspapers and magazines was cited by 21.5% and 19.1%, respectively.

Spanish television programming records its highest level of viewership among Hispanics in the New York market area where more than three-fourths of those interviewed (76.8%) stated that they viewed this medium.

Conversely, Hispanics in the Texas and other Southwestern markets registered the least level of Spanish television viewership. Hispanics in this particular market area also record the lowest level of mentions among the markets surveyed for listening to Spanish radio and reading Spanish language newspapers and magazines.

PERCENT OF ADULTS 18+
WHO WATCHED TV/LISTENED
TO RADIO/READ NEWSPAPERS/MAGAZINES
IN SPANISH, YESTERDAY
1984

	Total	New York	Florida	California	Texas/ South-West
Watched Spanish T.V.	67.2%	76.8%	67.8%	66.6%	57.5%
Listened To Spanish Radio	47.3	53.8	52.0	45.7	37.5
Read Spanish Newspapers	21.5	26.2	25.2	23.9	10.5
Read Spanish Magazines	19.1	24.4	19.5	24.4	8.2

Source: Strategy Research Corporation

Slightly more than one-half of the Hispanics in New York and Florida stated that they listened to Spanish language radio. One-fourth of the Hispanics in these two markets also mentioned that they read a Spanish newspaper yesterday.

The following table shows how much time the Hispanic spent yesterday watching, listening to and reading Spanish media.

AVERAGE HOURS OF TIME SPENT
YESTERDAY
WATCHING, LISTENING TO AND READING
SPANISH MEDIA
1984

	Total	New York	Florida	California	Texas/ South-West
Time Spent Watching Spanish T.V.	2.41	2.65	2.60	2.24	2.15
Time Spent Listening To Spanish Radio	1.24	1.29	1.38	1.22	1.04
Time Spent Reading A Newspaper In Spanish	.54	.57	.61	.58	.21
Time Spent Reading A Spanish Magazine	.47	.53	.56	.57	.33

Source: Strategy Research Corporation

On the whole, Hispanics spent slightly less than 2½ hours watching Spanish language television. New York and Florida Latins, however, spent more time watching Spanish language television stations than did Latins in California or Texas/Southwest.

Hispanics spend approximately 1¼ hours listening to Spanish language radio programs. This form of media, however, registers a lower level of listenership in the Texas/Southwest area where the average time spent is about one hour.

Hispanics in Florida spent an average of 37 minutes yesterday reading Spanish language newspapers. Hispanics in Texas and other Southwest markets record the least amount of time reading Spanish newspapers (13 minutes).

When asked how much time they spent reading Spanish language magazines yesterday, the average time recorded was 28 minutes. Hispanics in New York, Florida and California register somewhat similar levels of time spent reading Spanish magazines (average 33 minutes). Hispanics in the Texas/Southwest area, however, record lesser time spent (20 minutes) reading these types of publications.

By Age

Spanish television, radio, newspapers and magazines do not register any great variances among age groups. That is, U.S. Hispanics between the ages of 18 and 34, and those between 35 and 49 years of age watch, listen to and read Spanish media with approximately the same frequency.

PERCENT OF ADULTS 18+
WHO WATCHED TV/LISTENED
TO RADIO/READ NEWSPAPERS/MAGAZINES
IN SPANISH YESTERDAY
BY AGE
1984

		Age Groups	
	Total 18+	18-34	35-49
Watched Spanish T.V.	67.2%	67.6%	66.9%
Listened To Spanish Radio	47.3	48.4	46.8
Read Spanish Newspapers	21.5	22.1	21.0
Read Spanish Magazines	19.1	19.7	18.3

Source: Strategy Research Corporation

Print media, however, records a slightly higher level of readership among U.S. Hispanics 35 to 49 years of age. Conversely, broadcast media records a higher level of viewership among younger Hispanics in the 18 to 34 age group.

Hispanics 18 to 34 spent approximately one-half hour more watching Spanish television than did the Hispanics 35 to 49 years of age. Similarly, almost a quarter of an hour more was spent by the former age group listening to Spanish language radio.

AVERAGE HOURS OF TIME SPENT YESTERDAY WATCHING, LISTENING TO AND READING SPANISH MEDIA BY AGE GROUPS 1984

	Total 18+	Age Groups 18-34	35-49
Time Spent Watching Spanish T.V.	2.41	2.68	2.17
Time Spent Listening To Spanish Radio	1.24	1.36	1.15
Time Spent Reading A Newspaper In Spanish	.54	.47	.63
Time Spent Reading A Spanish Magazine	.47	.44	.51

Source: Strategy Research Corporation

The time spent reading Spanish newspapers and magazines is relatively the same for the 18 to 34 age group.

B. NUMBER OF TV SETS PER HOUSEHOLD

Strategy Research Corporation studies in major Hispanic markets reveal that the average number of TV sets per Hispanic household is 1.91.

U.S. HISPANIC MARKET
NUMBER OF TV SETS PER HOUSEHOLD
1984

ADI	Average TV Sets Per Hispanic Household
Corpus Christi	1.79
Fresno	1.53
Los Angeles	1.81
Miami	2.05
New York	2.13
Phoenix	1.88
Sacramento	1.61
Salinas	1.36
San Antonio	1.76
San Francisco	1.97
TOTAL U.S. HISPANICS	1.91

Source: Strategy Research Corporation
"Spanish Television Audience Research"

New York market area Hispanics have more television sets per household (2.13) than do Hispanic households in other major Hispanic ADI's.

Salinas registers the least number of TV sets per household at 1.36.

C. CABLE TELEVISION PENETRATION

Spanish Television Audience Research conducted by Strategy Research Corporation in selected ADIs reveals that 24% of U.S. Hispanic households have Cable Television.

U.S. HISPANIC MARKET
CABLE TELEVISION PENETRATION
1984

ADI	Hispanic Households With Cable TV
Corpus Christi	44%
Fresno	27
Los Angeles	7
Miami	30
New York	15
Phoenix	12
Sacramento	15
Salinas	44
San Antonio	53
San Francisco	34
TOTAL U.S. HISPANICS	24%

Source: Strategy Research Corporation "Spanish Television Audience Research"

The ADI registering the highest percentage of Cable Television viewership is Corpus Christi at 44%.

Meanwhile, the Los Angeles ADI records the least number of Hispanic households having Cable Television hookups (7%).

D. MEDIA MEASUREMENT

1. The STAR Local Market Service

The syndicated Spanish Television Audience Research (STAR) Service measures Hispanic viewing in major markets in the United States. Since the service was inaugurated in 1978, nearly 188,000 Personal, Face-to-Face interviews have been completed in 90,800 Hispanic households.

Each local market STAR Survey covers the ADI. For each market, an individual STAR report is issued with half-hour by half-hour audience results. The following tables show Hispanic audiences ratings and shares for the Monday-Friday Noon to 11:00 P.M. Day-Part, for Spring 1984. The markets surveyed in the Spring Wave 1984 were Fresno, Los Angeles, Miami, New York, Phoenix and San Francisco.

In the Fresno market, KFTV-21, the Spanish language station, received the highest average household rating of any television station for the Monday-Friday Noon to 11:00 P.M. Day-Part. KFTV scored a 20.6% average rating and a 38.0% share.

FRESNO STAR
MONDAY-FRIDAY
HISPANIC AUDIENCE ESTIMATES
NOON - 11:00 P.M.

Station	Sets In Use Share	Households Num. (000)	Households Rtg. Pct.	Women 18+ Num. (000)	Women 18+ Rtg. Pct.	Men 18+ Num. (000)	Men 18+ Rtg. Pct.
KFTV 21	38.0	19	20.6	19	18.7	14	14.5
KSEE 24	8.0	4	4.1	3	2.8	2	2.2
KMPH 26	16.0	8	9.2	4	4.0	3	3.1
KFSN 30	14.0	7	8.2	6	5.8	4	4.2
KJEO 47	12.0	6	6.2	4	4.3	3	2.8
CGAL 92	2.0	1	0.6	1	0.4	1	0.7
CABL 94	6.0	3	3.0	2	1.5	2	2.4
CHBO 95	4.0	2	2.0	2	1.7	2	2.1
TOTAL	100.0	43	48.0	40	39.4	32	32.2

In Los Angeles, KMEX-34 received an average household rating of 32.2% for the aforementioned Day-Part. This rating represents approximately 287,000 Hispanic households and a share of 42.1%.

LOS ANGELES STAR
MONDAY-FRIDAY
HISPANIC AUDIENCE ESTIMATES
NOON - 11:00 P.M.

Station	Sets In Use Share	Households Num. (000)	Households Rtg. Pct.	Women 18+ Num. (000)	Women 18+ Rtg. Pct.	Men 18+ Num. (000)	Men 18+ Rtg. Pct.
KCBS 2	8.2	36	6.2	28	2.7	33	3.4
KNBC 4	6.8	46	5.1	21	2.0	27	4.8
KTLA 5	8.5	58	6.5	21	2.0	24	1.9
KABC 7	11.0	75	8.5	44	4.3	41	4.2
KHJ 9	4.3	29	3.3	10	1.0	15	1.6
KTTV 11	10.7	73	8.2	19	1.8	30	3.1
KCOP 13	7.8	53	6.0	10	1.0	13	1.8
KMEX 34	42.1	287	32.2	274	25.6	185	19.2
MISC 96	0.6	4	0.5	4	0.4	3	0.3
TOTAL	100.0	543	60.8	430	41.1	378	39.3

WLTV-23 scored by far the highest average household rating for the Monday-Friday Noon to 11:00 P.M. Day-Part, in the Miami ADI. This SIN affiliate scored an average rating of 35.5% and a share of 53.4% with an average of 87,000 Hispanic households viewing.

MIAMI STAR
MONDAY-FRIDAY
HISPANIC AUDIENCE ESTIMATES
NOON - 11:00 P.M.

Station	Sets In Use Share	Households Num. (000)	Households Rtg. Pct.	Women 18+ Num. (000)	Women 18+ Rtg. Pct.	Men 18+ Num. (000)	Men 18+ Rtg. Pct.
WPBT 2	0.6	1	0.5	0	0.1	0	0.2
WTVJ 4	4.9	8	3.2	4	1.0	4	1.6
WCIX 6	11.1	18	7.5	6	1.8	7	2.4
WSVN 7	6.1	10	4.3	5	1.3	5	1.9
WPLG 10	11.7	19	7.6	10	2.8	9	3.2
WLTV 23	53.4	87	35.5	93	27.2	54	19.4
WDZL 39	3.7	6	2.3	2	0.5	3	1.0
CGAL 93	0.6	1	0.3	1	0.2	0	0.0
CHBO 94	1.2	2	0.8	1	0.4	2	0.5
CABL 96	6.7	11	4.4	6	1.7	6	2.3
TOTAL	100.0	135	55.2	128	37.0	91	32.9

In the New York Market there are two strong Spanish language stations. During the Day-Part under consideration WXTV-41, the SIN affiliate, received an average household rating of 16.4% and a share of 24.9% and WNJU-47 scored an average household rating of 15.9% and a 24.1% share.

Together, these two stations have 244,000 average households viewing Monday-Friday.

NEW YORK STAR
MONDAY-FRIDAY
HISPANIC AUDIENCE ESTIMATES
NOON - 11:00 P.M.

Station	Sets In Use Share	Households Num. (000)	Households Rtg. Pct.	Women 18+ Num. (000)	Women 18+ Rtg. Pct.	Men 18+ Num. (000)	Men 18+ Rtg. Pct.
WCBS 2	5.8	29	3.8	16	1.9	15	2.1
WNBC 4	6.2	31	4.2	18	2.3	15	2.0
WNEW 5	11.6	58	7.6	19	2.2	21	2.9
WABC 7	11.4	57	7.5	32	3.9	31	4.3
WOR 9	4.1	20	2.6	8	1.0	14	2.0
WPIX 11	9.2	46	3.8	12	1.6	15	2.1
WNET 13	1.5	7	0.9	2	0.3	1	0.9
WXTV 41	24.9	124	16.4	114	14.0	64	9.0
WNJU 47	24.1	120	15.9	111	13.4	45	5.5
MISC 96	1.2	6	0.7	3	0.3	3	0.5
TOTAL	100.0	423	68.9	338	40.6	227	31.7

In the Phoenix Market KTVW-33 has more than twice the audience than its closest rival. KTVW scored a 28.7% average household rating and a 44.4% Sets In Use Share.

PHOENIX STAR
MONDAY-FRIDAY
HISPANIC AUDIENCE ESTIMATES
NOON - 11:00 P.M.

Station	Sets In Use Share	Households		Women 18+		Men 18+	
		Num. (000)	Rtg. Pct.	Num. (000)	Rtg. Pct.	Num. (000)	Rtg. Pct.
KTVK 3	11.1	6	6.7	3	3.5	3	3.4
KPHO 15	20.4	11	13.0	6	5.9	4	4.6
KTSP 10	7.4	4	5.5	3	2.5	3	3.0
KPNX 12	9.3	5	6.2	2	2.1	3	3.3
KNXV 15	3.7	2	2.2	1	0.5	1	0.9
KTVW 33	44.4	24	28.7	24	27.4	10	18.9
CHBO 94	1.9	1	1.2	0	0.4	0	1.5
CABL 95	1.9	1	1.2	1	0.6	1	1.9
TOTAL	100.0	44	53.6	37	41.5	30	36.1

KDTV-14, the SIN affiliate in San Francisco, received an average household rating of 24.4% and an average share of 43.6 on Monday-Fridays. KDTV has a daily average audience of 61,000 Hispanic households.

SAN FRANCISCO STAR
MONDAY-FRIDAY
HISPANIC AUDIENCE ESTIMATES
NOON - 11:00 P.M.

Station	Sets In Use Share	Households		Women 18+		Men 18+	
		Num. (000)	Rtg. Pct.	Num. (000)	Rtg. Pct.	Num. (000)	Rtg. Pct.
KTVU 2	10.7	15	7.1	6	5.9	7	3.4
KRON 4	5.0	7	3.1	3	1.0	5	2.0
KPIX 5	6.4	9	4.2	5	3.4	5	2.3
KGO 7	10.7	15	7.5	8	4.8	7	3.4
KNTV 11	5.0	7	3.1	3	1.4	4	1.6
KDTV 14	43.6	61	24.4	67	29.4	41	14.8
KTZO 20	2.9	4	2.1	2	1.1	2	1.1
KBHK 44	9.3	13	6.0	4	2.2	6	2.4
CGAL 94	0.7	1	0.3	1	0.3	1	0.3
CABL 95	2.1	3	1.4	1	0.8	3	1.1
MISC 96	3.6	5	2.2	3	1.6	3	1.3
TOTAL	100.0	112	54.0	103	47.6	84	38.6

As previously mentioned, these tables show averages for a particular broad Day-Part. The comprehensive Spanish Television Audience Research reports are available by subscription.

2. Reach And Frequency System

Advertisers and agencies engaged in Hispanic marketing have long desired the ability to analyze the Reach and Frequency of television schedules among the Hispanic market. Some advertisers have held back from investing in Spanish advertising for lack of ability to measure the audience of their English language campaigns among Hispanics, alone or in combination with Spanish campaigns. The Strategy Research Corporation Reach and Frequency System, described herein, is designed to answer these needs.

The SRC Reach and Frequency System provides Reach and Frequency analyses for any market where the basic input is available. This input consists of two parts:

1. The number of spots and average rating, by daypart, of the client's advertising schedule. (These will of course be known to anyone desiring to have Reach and Frequency calculated).

2. The daypart and station weekly cumulative audiences for the schedule. These are available in SRC's regular syndicated STAR Reports. Anglo station cumes, not published in STAR Reports, are maintained in SRC offices for use with the system.

NOTE: These input data are available for all STAR markets. The system may be used with past and future STAR Reports.

System output comprises reach of each daypart, station total reach, frequency and GRP, and schedule total reach, frequency and GRP. Additionally, frequency distribution is provided, which may be used by the client to develop "effective reach" or quintile analyses.

All output data is generated through the Beta Bi-nomial Model of Frequency Distribution.

The great advantage of this system is in that it employs actual measurements of audience ratings and cume developed within the Spanish market. It does not apply curves or tables developed outside the market for audiences known to have different viewing habits and patterns.

VI. HOUSEHOLD INCOME AND PERSONAL CONSUMPTION EXPENDITURES

VI. HOUSEHOLD INCOME AND PERSONAL CONSUMPTION EXPENDITURES

This section of the Report presents data with regard to the U. S. Hispanic's purchasing power.

1. Median Family Income

In 1985, the median family income for U. S. Hispanics is estimated at $19,900. This compares to $28,400 for the general U. S. population.

Cubans have the highest median family income of the various Hispanic groups.

U. S. HISPANIC MARKET
MEDIAN FAMILY INCOME
BY TYPE OF HISPANIC ORIGIN
1978, 1980, 1982, 1985

	1978	1980	1982	1985
Total United States	$16,786	$19,917	$23,433	$28,400
Total U. S. Hispanic Origin	$11,421	$14,712	$16,228	$19,900
Mexican	11,742	14,765	16,399	20,200
Puerto Rican	7,972	10,734	11,148	14,200
Cuban	N.A.	18,245	18,883	24,400
Other Hispanic	13,514	16,230	19,069	23,000

N.A. = Not Applicable

Source: U. S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

By region, median family income is highest in the Southeast ($24,100), while income is lowest in the Northeastern states ($14,400). The Southwest region also registers a median family income ($19,500) under the U. S. Hispanic equivalent ($19,500 versus $19,900, respectively).

MEDIAN U. S. HISPANIC FAMILY INCOME BY REGION 1985

Region	Median Family Income
Northeast	$14,400
Southeast	24,100
Central	20,600
Southwest	19,500
Northwest	22,000
Pacific	21,300
U. S. HISPANIC MEDIAN	$19,900

Source: Strategy Research Corporation

2. Mean Household Income/Aggregate Household Income

Mean household income is defined as "arithmetic average" household income. It is derived by summing the individual household income values and dividing the total by the number of households. Another way of stating this concept is "income per household". Since mean household income is calculated in this fashion, the values tend to be higher than the corresponding medians (value of the mid-point household's income in an array of households), due to a few households with extremely high incomes.

U. S. Hispanics had a mean household income in 1979 of $16,019 with the 1985 figure revealing an increase of 61% ($25,837).

U. S. HISPANIC MARKET
MEAN HOUSEHOLD INCOME
BY REGION
1979 AND 1985

	Mean Income	
Region	1979	1985
Total U. S. Hispanic	**$16,019**	**$25,837**
Northeast	$13,891	$22,400
Southeast	17,739	28,600
Central	16,623	26,800
Southwest	14,959	24,100
Northwest	14,562	23,500
Pacific	17,742	28,600

Source: U. S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The figures confirm that the Southeast and Pacific households have the highest incomes, on the average.

Since mean household incomes are simple arithmetic averages they may be used to develop aggregate household income which is presented in the following table.

U. S. HISPANIC MARKET
AGGREGATE HOUSEHOLD INCOME
BY REGION
1979 AND 1985
MILLIONS OF DOLLARS

Region	Aggregate Household Income 1979 (Million $)	1985 (Million $)
Total U. S. Hispanic	**$64,330**	**$123,385**
Northeast	$10,993	$19,249
Southeast	7,760	14,764
Central	5,985	10,480
Southwest	15,236	30,707
Northwest	2,890	5,268
Pacific	21,466	42,917

Source: Strategy Research Corporation

The contiguous Southwest and Pacific Regions together will account for an estimated 60% of U. S. Hispanic household income in 1985.

Aggregate household income, however, provides only an indirect measure of a geographic area's market potential or, "purchasing power". This is because aggregate income includes such components as Federal Income Tax, personal contributions for social insurance and, of course, saving by households out of their income. When these items are deducted, the remainder is "personal consumption expenditures" on goods and services.

3. Personal Consumption Expenditures

The aggregate income data provided in the previous table, together with parameters developed from data compiled from the U. S. Bureau of Economic Analysis, were used to produce the following table which shows the major components of personal consumption expenditures (purchasing power) for U. S. Hispanics by region.

U. S. HISPANIC MARKET
ESTIMATED PERSONAL CONSUMPTION EXPENDITURES BY REGION
1985
(MILLIONS OF DOLLARS)

	Total	Durable Goods	Non-durable Goods	Services
Total U. S. Hispanic	**$94,144**	**$11,969**	**$3,750**	**$44,666**
Northeast	14,687	1,867	5,852	6,968
Southeast	11,265	1,432	4,488	5,345
Central	7,997	1,017	3,186	3,794
Southwest	23,430	2,979	9,335	11,116
Northwest	4,019	511	1,601	1,907
Pacific	32,746	4,163	13,047	15,536

Source: Strategy Research Corporation

Of the estimated $94.1 million dollars available, approximately 13% will be applied by U. S. Hispanics toward the purchase of durable goods, 40% toward non-durable goods, and an estimated 47% will go toward the purchase of service-related goods and services.

The two Pacific region states of California and Hawaii record the highest estimated personal consumption expenditures of all the regions.

VII. MARKET BY MARKET

VII. MARKET BY MARKET

Presented in this section of the Report are the thirty largest Hispanic markets in the United States. Together, these 30 markets constitute 84% of the total U.S. Hispanic population. In this regard, the cumulative picture they offer is closely representative of the national U.S. Hispanic market.

A market is defined as a TV ADI and an ADI (Area of Dominant Influence) is defined by Arbitron and includes U.S. counties and excludes non-U.S. areas.

At the national level, the U.S. Hispanic market shares a number of demographic characteristics that begins to define U.S. Hispanics as a separate market segment. The national U.S. Hispanic market has larger and younger families than the general population. U.S. Hispanics are more geographically concentrated and more heavily urban than the general population. The disproportionately faster growth experienced by the U.S. Hispanic population, in comparison to the general population, also contributes to a demographic definition of the national U.S. Hispanic population as a distinct market segment.

All these qualities are evident in varying degrees in each of the Top Thirty U.S. Hispanic markets. Regional differences are also evident, notably in the country of origin of the Hispanic populations in each of the cities. For example, Puerto Ricans are found more often in the New York market than in others, as are Mexicans in California and Texas, and Cubans in Florida.

Fluctuations also exist in the degree of Hispanic concentration within the metropolitan areas, income and spending power, and the percentage of the total market population which the Hispanic population represents.

Notwithstanding the existing demographic differences among the Top Thirty U.S. Hispanic markets, the U.S. Hispanic population shares far more basic demographic similarities than differences.

More importantly, the U.S. Hispanic population shares certain cultural characteristics that established it as a distinct and identifiable segment of the general population. The Spanish language, more than any other single identifier, culturally describes the U.S. Hispanic population being perhaps its most definitive and universal characteristic. The origin of the U.S. Hispanic population may vary from Mexican to Puerto Rican, from Cuban to Latin American, but every Hispanic origin group has purposefully insisted on maintaining the Spanish language alive, particularly in the home.

Each Hispanic origin group also has its own unique heritage and history, celebrating different national holidays which are commemorated in their home countries. Nevertheless, U.S. Hispanics share basic cultural values and traditions that have much more to do with being Hispanic than with being from any single Hispanic country. The U.S. Hispanic population embraces a close family orientation, the extended family not being uncommon. As an entity, U.S. Hispanics also adhere to a strong Catholic tradition as one of their most salient cultural characteristics. These shared cultural traits have much greater impact on shaping behavior attitudes and perceptions than the individual history of a specific country of origin.

Whether in terms of demographics or cultural values, the Hispanic populations in the Top Thirty U.S. Hispanic markets are different in degree rather than in kind. The similarities they share far outweigh the differences, and it is exactly these similarities and shared qualities that define the national U.S. Hispanic market.

A. TOP 30 HISPANIC MARKETS

A total of 84.1% of the total U.S. Hispanic population is heavily concentrated within thirty Hispanic markets. In fact, slightly more than 50% of the total U.S. Hispanic population resides in the top six markets of Los Angeles, New York, Miami, San Antonio, Chicago and San Francisco.

TOP 30 HISPANIC MARKETS
1985

Rank	Market (ADI)	Hispanic Population (000)
1	Los Angeles	3,353.7
2	New York	2,442.3
3	Miami	863.5
4	San Antonio	781.8
5	Chicago	741.4
6	San Francisco	717.2
7	Houston	611.3
8	McAllen/Brownsville	537.8
9	Albuquerque	422.2
10	El Paso	419.2
11	Fresno	369.1
12	San Diego	340.1
13	Dallas/Ft. Worth	324.6
14	Phoenix	317.6
15	Sacramento/Stockton	307.3
16	Corpus Christi	283.1
17	Denver	253.7
18	Philadelphia	225.0
19	Tucson	191.7
20	Salinas/Monterey	141.2
21	Austin	138.0
22	Boston	131.2
23	Lubbock	124.7
24	Tampa/St. Petersburg	122.7
25	Laredo	113.1
26	Washington, D.C.	111.3
27	Odessa/Midland	106.6
28	Colorado Springs/Pueblo	95.5
29	El Centro/Yuma	92.8
30	Bakersfield	91.5
	TOTAL OF TOP 30	14,771.2
	TOTAL U.S. HISPANIC	17,562.7
Top 30 as a percent of total U.S. Hispanic		84.1%

Source: Strategy Research Corporation

MARKET-1

LOS ANGELES

1. Population - 1985

The Los Angeles ADI is the number one ranked Hispanic Market in the United States with a projected Hispanic population in 1985 of 3,353,700 persons. Seventy-five percent of these Hispanics (2,506,200) reside in metropolitan Los Angeles (Los Angeles County) making it by far the largest Hispanic populated county of any in the U.S.

Orange County is the second most Hispanic populated county within the Market with 366,900 persons, or 11% of the total. San Bernardino County is the third most populous with an estimated 208,100 Hispanics in 1985.

The overall Market experienced a growth in Hispanic population of 128% in the decade between 1970 and 1980 with each individual county growing substantially over the ten year period.

LOS ANGELES MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Inyo	CA	0.6	1.1	1.4
Kern East	CA	6.5	3.4	17.0
Los Angeles	CA	911.0	2,065.7	2,506.2
Orange	CA	105.6	286.3	366.9
Riverside West	CA	43.9	102.6	111.3
San Bernardino	CA	79.6	165.3	208.1
Ventura	CA	55.7	113.2	142.8
TOTAL		1,202.9	2,737.6	3,353.7

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

2. Age/Sex Of The Population

Adult Hispanic females outnumber the males in this Market by 83,900 with the greatest differences occuring in the older age groups.

Nearly 40% of the Los Angeles Market's Hispanic population is under 18 years of age with 71.0% under the age of 35. Only 4.0% are 65 or older.

LOS ANGELES
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	527.0		15.7%	
Males 35 - 49	261.5		7.8	
Males 50 - 64	137.6		4.1	
Males 65+	49.8		1.5	
Males 18+		**975.9**		**29.1%**
Females 18 - 34	536.3		16.0	
Females 35 - 49	278.7		8.3	
Females 50 - 64	161.1		4.8	
Females 65+	83.7		2.5	
Females 18+		**1,059.8**		**31.6**
Teens (12 - 17)	**402.5**		**12.0**	
Children (0 - 11)	**915.5**		**27.3**	
TOTAL	**3,353.7**		**100.0%**	

Source: Strategy Research Corporation

The fertility rate of Mexican-Americans is high. According to a vital statistics survey of births in nine states (Arizona, California, Colorado, Florida, Illinois, Indiana, New Jersey, New York and Ohio), Hispanic women had a fertility rate of 101 births per 1,000 women aged 15 to 44, while the national rate was only 67. Mexican-origin women a had fertility rate of 119, thus resulting in much larger household sizes.

3. Country Of Origin

Companies marketing to Mexican-Americans regard Los Angeles as a prime area. Approximately 80% of Los Angeles Hispanics are of Mexican origin, representing 22% of the total U.S. Mexican population. (Mexican-Americans are the largest Hispanic ethnic group, comprising approximately 60% of the country's Hispanics.).

4. Language Spoken At Home

Roughly six out of every ten Hispanics in the Los Angeles Market speak Spanish in the home, while approximately 30% speak both English and Spanish at home.

5. Telephone Ownership

Forty percent of Hispanic households in the Los Angeles Market do not have a phone. Additionally, 42% of the Hispanic households of this Market have unlisted phones.

	Percent
Households Without Phones	40%
Households With Unlisted Phones	42
Total Listed Phone Homes	18
TOTAL	100%

Source: Strategy Research Corporation "Spanish Television Audience Research"

Only 18% of the Hispanic households of this Market are available to survey research using a listed telephone methodology.

It should be pointed out that the lack of a phone in a Hispanic household does not necessarily mean that the family cannot afford one, for many Hispanics, a telephone is simply not part of their culture.

6. Spanish Media Availability

The Los Angeles Market is served by seven Spanish language radio stations and approximately 26 Spanish language local newspapers and magazines.

	Approximate Number Serving The Area
Spanish Language Radio Stations	7
Spanish Language Television Stations	2
Spanish Language Local Newspapers/Magazines	26

Los Angeles has two television stations with Spanish language programming. These are KMEX (Channel 34) the SIN Television Network affiliate, and KSCI (Channel 18).

The Los Angeles Hispanic Market has a relatively low Cable Television penetration of approximately 7%.

7. Home Ownership

Approximately seven out of every ten Hispanics in the Los Angeles metro area live in single family homes with a 40% level of ownership.

8. Automobile Ownership

With regard to automobile ownership, almost three-fourths of all Hispanics in the market area own at least one car with substantial preference for domestic cars, as opposed to imports.

9. Restaurant Patronage Incidence

The incidence of frequenting non-fast food type restaurants in the Los Angeles metro is high (75%). Approximately two-thirds of all households frequent non-fast food type restaurants at least once a month. Furthermore, almost 50% eat in regular restaurants more than once a month.

Fast food restaurant patronage, however, is higher and more frequent than its regular restaurant counterpart. The highest incidence of visitation is among hamburger-type fast food restaurants followed by chicken, Italian and Mexican-types.

Mexican-origin Hispanics are an important market for children's products. Research conducted by Strategy Research Corporation indicates that Hispanics in Los Angeles are heavy consumers of baby food, baby powder and other related baby-type items.

MARKET-2

NEW YORK

1. Population - 1985

The New York Market is the number two ranked Hispanic Market in the U.S. In 1985, the New York Market will have an estimated Hispanic population of nearly 2,442,300 persons; equivalent to 14% of the total United States Hispanic population.

The Hispanic population of New York is heavily concentrated in the five boroughs of New York City. Two-thirds of all the Hispanics in the Market reside in Bronx, Kings, New York, Queens and Richmond Counties. Together, these New York City counties account for 1,622,400 Hispanics.

With the inclusion of the City's adjacent counties of Nassau, Suffolk, Westchester, Bergen, Hudson, Essex, Passaic, Union and Middlesex, the Hispanic population increases to 2,283,000 persons; 93% of the Market's total Latin population.

During the early stages of Hispanic population growth in the New York Market, much of the movement was to the borough of the Bronx. However, in the decade between 1970 and 1980, the New Jersey portion of the Market has also registered a substantial increase in Hispanic population. That is, from 1970 to 1980, the Hispanic population grew by 315,200 persons, or an increase of nearly 300%. Even in the 1980 to 1985 period, Hispanic population growth in the Jersey area shows an increase of 24%.

Considerable growth has been witnessed within Queens County. In 1970 there were only 33,800 Hispanics living within the county compared to 348,800 recorded for 1985. From 1970 to 1980 the Hispanic population of Queens increased 676% while during this same period, total population in Queens actually declined by 4.8% (1,987,174 versus 1,891,325, respectively). In this same ten year period, while the Hispanic population for all five boroughs increased by 73%, the total city population decreased by 10.4% (from 7,895,563 in 1970 to 7,071,030 in 1980). Meanwhile, in the period 1980 to 1985, the Hispanic population in Queens County has increased by 33%. Overall population for Queens County, however, has increased by 3.3%.

In general, Hispanics have spread out from Manhattan, but there has been far less movement to suburban areas in the New York market than in most other markets with substantial Hispanic populations. Again, the movement has been largely confined to three of the New York City boroughs (the Bronx, Brooklyn and Queens) and to such heavily urban areas of northern New Jersey as Newark, Jersey City and Union.

NEW YORK MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Bronx	NY	316.4	396.7	423.8
Dutchess	NY	1.6	5.9	7.3
Kings	NY	270.6	392.1	435.1
Nassau	NY	7.1	43.3	55.4
New York	NY	184.7	335.8	391.3
Orange	NY	2.9	11.3	13.8
Putnam	NY	0.5	1.3	1.5
Queens	NY	33.8	262.4	348.8
Richmond	NY	4.7	18.9	23.4
Rockland	NY	3.9	11.8	14.5
Suffolk	NY	16.9	58.7	72.8
Sullivan	NY	0.8	2.7	3.3
Ulster	NY	1.7	4.9	5.7
Westchester	NY	5.4	45.6	61.2
Bergen	NJ	3.6	28.5	36.6
Essex	NJ	28.8	76.6	92.6
Hudson	NJ	32.3	145.2	182.4
Hunterdon	NJ	0.7	1.0	1.0
Middlesex	NJ	11.1	34.1	41.8
Monmouth	NJ	3.7	12.9	16.4
Morris	NJ	2.7	11.0	13.6
Ocean	NJ	2.5	8.4	10.7
Passaic	NJ	19.8	62.1	77.1
Somerset	NJ	0.8	4.1	5.0
Sussex	NJ	1.4	1.8	1.9
Union	NJ	4.9	40.8	52.8
Warren	NJ	*	1.0	NA
Fairfield	CT	28.5	45.1	52.1
Pike	PA	0.1	0.2	0.4
TOTAL		991.9	2,064.2	2,442.3

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

2. Age/Sex Of The Population

In terms of the age distribution of the Hispanic market in the New York ADI, approximately 36% are under 18 years of age, while 70% are under the age of 35.

NEW YORK
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	395.6		16.2%	
Males 35 - 49	188.1		7.7	
Males 50 - 64	105.2		4.3	
Males 65+	31.7		1.3	
Males 18+		**720.6**		**29.5%**
Females 18 - 34	427.2		17.5	
Females 35 - 49	224.5		9.2	
Females 50 - 64	127.3		5.2	
Females 65+	58.6		2.4	
Females 18+		**837.6**		**34.3**
Teens (12 - 17)	**273.7**		**11.2**	
Children (0 - 11)	**610.4**		**25.0**	
TOTAL	**2,442.3**		**100.0%**	

Source: Strategy Research Corporation

The fertility rate among Puerto Ricans is high, with approximately 81 births per 1,000 women aged 15 to 44.

3. Country Of Origin

Puerto Ricans (the second largest Hispanic ethnic group in the United States) are the dominant type of Hispanics in New York, representing approximately 60% of the population. The second largest Hispanic group in the New York area is Dominicans and third largest is Cubans who are mainly located in the counties of Essex, Hudson and Union, in New Jersey.

4. Language Spoken At Home

With regard to language, over seven out of every ten of the Hispanics in the New York Market speak Spanish in the home. Furthermore, an additional 20% speak both Spanish and English in the home.

5. Telephone Ownership

In the New York Market 44% of the Hispanic households do not have a telephone.

	Percent
Households Without Phones	44%
Households With Unlisted Phones	42
Total Listed Phone Homes	14
TOTAL	100%

Source: Strategy Research Corporation "Spanish Television Audience Research"

Additionally, 42% of Hispanic homes have unlisted telephones. Therefore, only 14% of the Spanish households in New York have listed telephones.

6. Spanish Media Availability

There are a total of six Spanish language radio stations serving the New York Hispanic Market, while this same Market is served by eight Spanish language newspapers.

	Approximate Number Serving The Area
Spanish Language Radio Stations	6
Spanish Language Television Stations	2
Spanish Language Local Newspapers/Magazines	8

Like Los Angeles, New York is served by two Spanish language television stations. The SIN affiliate WXTV (Channel 41) and WNJU (Channel 47).

Approximately 15% of the Hispanic households in the New York area are wired for cable television.

7. Product Usage

Hispanics in New York are heavy consumers of Fruit Type Drinks, Liquid Cooking and Salad Oil, Rice, Tea, Tuna Fish, Dishwashing Liquid, Fabric Softeners and Window Cleaners, just to name a few product categories. (See Section IX).

MARKET-3

MIAMI

1. Population - 1985

The Miami Market is the number three ranked Hispanic Market in the United States with a 1985 estimate of 863,500 Hispanic persons situated within the tri-county area. A total of 93.3% of these Hispanics live in Dade County. In fact, 43% of Dade County's total population is of Hispanic origin or descent.

Broward County now has a growing Latin population estimated at slightly over 50,000, and Monroe County, consisting of the Florida Keys, has a Latin population in excess of 7,000 persons. Thus, this total South Florida Market has a population of nearly 863,500 persons.

MIAMI MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Broward	FL	15.5	40.3	50.3
Dade	FL	299.2	664.5	805.8
Monroe	FL	7.8	7.2	7.4
TOTAL		322.5	712.0	863.5

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

By comparing total population growth with Hispanic population growth, the scope of the Miami Latin segment is evident. While the tri-county Hispanic population has grown by 21% from 1980 to 1985 (712,000 to 863,500), the total population has grown by only 15% (from 2,702,900 to 3,109,300).

2. Age/Sex Of The Population

In terms of the age distribution of the Hispanic market in Miami, approximately 28% are under 18 years of age, while 54% are under the age of 35.

MIAMI
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	101.2		11.7%	
Males 35 - 49	83.7		9.7	
Males 50 - 64	59.7		6.9	
Males 65+	31.8		3.7	
Males 18+		**276.4**		**32.0%**
Females 18 - 34	120.8		14.0	
Females 35 - 49	97.8		11.3	
Females 50 - 64	81.3		9.4	
Females 65+	43.3		5.0	
Females 18+		**343.2**		**39.7**
Teens (12 - 17)	**81.0**		**9.4**	
Children (0 - 11)	**162.9**		**18.9**	
TOTAL	**863.5**		**100.0%**	

Source: Strategy Research Corporation

The Hispanic population in Miami is older than the Hispanic population of other markets with large quantities of Hispanics.

3. Country Of Origin

The Latin market in Miami is a large market, and continues to grow as a result of natural increase (births over deaths) and new in-migration.

Currently, 84% of Latin households in Dade County are headed by persons of Cuban origin. Between 1970 and 1980, the proportion of Cuban households had been declining (from 87% to 80%). This was a result of a rising number of people from Central and South America joining the Cuban community in South Florida. The increase in Cuban households from 1980 to 1985 reflects the arrival of approximately 125,000 Cuban refugees via the Mariel boatlifts in the Spring of 1980.

Even though the proportion of Cuban-headed households rose from 1980 to 1985, the Central American households continue to increase. This is largely due to the increasing attractiveness of South Florida in relation to continuing economic and political unrest in Central America; most notably in Nicaragua and El Salvador.

4. Language Spoken At Home

Approximately nine out of every ten Hispanics in the Miami Market speak Spanish in the home.

5. Telephone Ownership

Among the major Hispanic markets in the United States, Miami has the smallest incidence of households without telephones (8%). Thirty-eight percent of Miami Hispanic homes have unlisted telephone numbers.

	Percent
Households Without Telephones	8%
Households With Unlisted Phones	38
Total Listed Phone Homes	54
TOTAL	100%

Source: Strategy Research Corporation "Spanish Television Audience Research"

Slightly over half (54%) of the Hispanic households in the Miami area have listed telephones.

6. Spanish Media Availability

Seven full-time Spanish radio stations are currently serving the Miami Spanish-speaking Market. A total of nine Spanish language newspapers/magazines presently serve this Market.

	Approximate Number Serving The Area
Spanish Language Radio Stations	7
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	9

Only one full-time Spanish language television station operates in the Miami market - WLTV (Channel 23 - a SIN affiliate).

The Miami Hispanic Market has a relatively high penetration of cable television of 30%.

7. Employment Characteristics

Approximately 30% of the Latin heads of household in Miami are employed in white collar professions. Almost half are employed in blue collar jobs, and 20% are retired, students or unemployed.

Currently, 1.3 members per Latin household in Dade County are employed full-time. Approximately 40% of Hispanic households in Dade County have at least one female member who is employed full-time.

8. Supermarket Patronage

Patronage of American chain supermarkets and convenience stores has declined significantly since 1980. This is a reflection of two influences. First, there has been a tremendous ingress of Latins who are both not fluent in English (from Mariel and Central America), and who have not as yet developed American chain store habits, and, Latin supermarket chains have been making great strides in the South Florida market. However, in the past few years, this Market has witnessed a strong rise in the competitiveness of Latin supermarkets. These operations have been aggressively moving into predominantly Hispanic neighborhoods and providing Latin shoppers with specialty items not easily found in American chain stores, along with American chain operation type benefits.

Incidence of shopping in American supermarkets is higher among non-Cubans than among Cuban Latins in Dade County.

This may be a reflection of the fact that non-Cubans have a greater preference outside the heavily Hispanic, primarily Cuban, neighborhoods in which Latin supermarkets have been concentrating their efforts.

9. Incidence Of Fast Food Restaurant Patronage

Eating out is popular among Dade's Latins, especially when it comes to hamburger, chicken and pizza-type restaurants.

Among Dade's Latin households, incidence of buying from hamburger-type fast food restaurants has decreased since 1980, from 84% to 76%. This decline is attributed to the new arrivals, the economic situation in the Market, and increasing competition from other fast food type operations.

Incidence of patronage of chicken-type fast food restaurants, on the other hand, has increased since 1980. Chicken, being less foreign to the Latin diet than the American hamburger, has had a higher trial among new arrivals to this country.

Pizza restaurants are patronized by approximately six out of every ten Hispanics.

MARKET-4

SAN ANTONIO

1. Population - 1985

The San Antonio Market is the number four ranked Hispanic Market in the United States. There is a total of 781,800 Hispanics in the Market and these are heavily concentrated in Bexar County. Specifically, 565,400 Hispanics (72.3% of the ADI's total Hispanic population) are located within this one county.

Overall, the number of Hispanics residing in San Antonio increased from 424,000 in 1970 to 638,500 in 1980, a growth of 51%. The Market now boasts a Hispanic population 22% greater than that recorded in 1980.

SAN ANTONIO MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Atascosa	TX	8.0	12.0	15.0
Bandera	TX	0.3	0.9	1.2
Bexar	TX	306.9	460.9	565.4
Comal	TX	6.0	8.7	11.0
De Witt	TX	3.3	4.4	4.9
Dimmit	TX	6.7	8.8	9.9
Edwards	TX	0.9	1.0	1.1
Frio	TX	6.2	9.4	11.2
Gillespie	TX	0.9	1.4	1.7
Goliad	TX	1.6	1.8	2.2
Gonzales	TX	3.9	4.9	5.6
Guadalupe	TX	7.7	11.9	14.7
Karnes	TX	4.7	5.8	6.5
Kendall	TX	1.2	1.4	1.7
Kerr	TX	1.8	3.9	5.0
Kimble	TX	0.6	0.7	NA
Kinney	TX	1.0	1.3	1.5
La Salle	TX	3.5	4.1	4.7
La Vaca	TX	0.9	1.3	1.5
Live Oak	TX	2.4	3.1	3.7
McMullen	TX	0.3	0.3	0.3
Maverick	TX	13.8	28.4	37.8
Medina	TX	8.2	10.0	11.8
Real	TX	0.4	0.6	0.7
Uvalde	TX	7.2	12.4	15.3
Val Verde	TX	13.0	22.6	28.7
Wilson	TX	4.5	6.1	7.4
Zavala	TX	8.3	10.4	11.3
TOTAL		424.2	638.5	781.8

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The three Texan counties of Bexar, Comal and Guadalupe constitute the metropolitan area. It is within these counties that 75.6% of the ADI's Latin population live. Approximately 90% of the Hispanics live within San Antonio city limits, whereas the remainder live in areas outside of the central city.

2. Age/Sex Of The Population

In terms of the age characteristics of the San Antonio Hispanic Market, 41.4% of the population is under 18 years of age, while a total of 69.0% are under 35 years of age.

SAN ANTONIO
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	103.8		13.3%	
Males 35 - 49	50.0		6.4	
Males 50 - 64	38.1		4.9	
Males 65+	19.9		2.5	
Males 18+		**211.8**		**27.1%**
Females 18 - 34	111.7		14.3	
Females 35 - 49	61.0		7.8	
Females 50 - 64	45.8		5.9	
Females 65+	27.6		3.5	
Females 18+		**246.1**		**31.5**
Teens (12 - 17)	**105.2**		**13.4**	
Children (0 - 11)	**281.7**		**28.0**	
TOTAL	**781.8**		**100.0%**	

Source: Strategy Research Corporation

Approximately 32% of the Hispanics are females 18 years of age and older compared with 27% adult males.

The San Antonio Hispanic household is 17% larger than its non-Hispanic counterpart. That is, the average number of Hispanics per household is 3.4 versus 2.9 for non-Hispanic.

3. Country Of Origin

San Antonio's residents are predominantly of Mexican origin; more than nine out of every ten are of Mexican descent. As the area was originally explored and settled by the Spanish, it has a rich Latin culture and heritage; Mexico relinquished rights to Texas in 1846 - only 139 years ago.

4. Language Spoken At Home

Roughly half of the San Antonio Hispanic population speak both English and Spanish most frequently at home. A significant amount, however, prefer Spanish for communication within the home (28%).

5. Telephone Ownership

Thirteen percent of the Hispanic households in the San Antonio Market do not have a telephone.

	Percent
Households Without Telephones	13%
Households With Unlisted Phones	44
Total Listed Phone Homes	43
TOTAL	100%

Source: Strategy Research Corporation "Spanish Television Audience Research"

The remaining 87% of the Hispanics who do have phones are divided almost equally with regard to incidence of listed and unlisted telephones. Forty-four percent have unlisted telephones, while 43 percent have listed phones.

6. Spanish Media Availability

The San Antonio Hispanic Market is served by four Spanish language radio stations and three newspapers aimed at Hispanic readers.

	Approximate Number Serving The Area
Spanish Language Radio Stations	4
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	3

This market is served by one Spanish language television station; KWEX (Channel 41), the first SIN station in the United States.

The San Antonio Hispanic Market has a very high Cable Television penetration. Approximately 53% of San Antonio Hispanic households have Cable TV.

7. Employment Characteristics

The percentage of households with one employed member is similar for Hispanic and non-Hispanic (both approximately 50%). The percentage of households with two wage earners, however, is 54% for Hispanic homes.

8. Length Of Residence Of Head Of Household

San Antonio Hispanics are notably stable, permanent, long-term residents of the area. Some 43.3% of Hispanic heads of household have lived in the area for more than 20 years and nearly two out of three for more than ten years.

9. Automobile Ownership

With regard to automobile ownership, three out of every four San Antonio Hispanic households own at least one car.

10. Credit Card Ownership

Credit cards (department store type) are owned by approximately one-half of San Antonio Hispanics.

11. Incidence Of Fast Food Restaurant Patronage

San Antonio Hispanics are frequent consumers of fast food type restaurants. Almost one-fourth of Hispanic families frequent a fast food restaurant more than once a week.

MARKET-5

CHICAGO

1. Population - 1985

Chicago is the nation's fifth largest Hispanic Market. The total number of Hispanics residing within the Chicago ADI in 1985 equals 741,400, up from a level of 640,200 in 1980. This represents a growth of nearly 16% over the five year period 1980 - 1985.

CHICAGO MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Cook	IL	285.6	499.3	578.0
DeKalb	IL	0.8	1.4	1.5
DuPage	IL	6.9	17.3	22.0
Grundy	IL	0.2	0.5	0.6
Iroquois	IL	0.1	0.4	0.4
Kane	IL	11.6	26.1	31.5
Kankakee	IL	0.8	1.3	1.4
Kendall	IL	0.3	1.1	1.3
Lake	IL	11.1	21.1	25.1
La Salle	IL	1.5	2.5	2.7
Livingston	IL	0.2	0.6	0.7
McHenry	IL	1.5	3.0	3.6
Will	IL	7.2	13.8	15.9
Jasper	IN	0.5	0.3	0.3
Lake	IN	35.5	43.9	47.8
La Porte	IN	0.6	1.2	1.3
Newton	IN	0.1	0.1	0.1
Porter	IN	1.1	2.7	3.2
Kenosha	WI	2.7	3.6	4.0
TOTAL		368.3	640.2	741.4

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The City of Chicago, located in Cook County, houses nearly 70% of all the Hispanics comprising the Market.

2. Age/Sex Of The Population

The Chicago Hispanic Market is quite young, 41.2% are under 18 years of age, while 75.1% are under 35 years of age.

CHICAGO
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	125.9		17.0%	
Males 35 - 49	61.4		8.3	
Males 50 - 64	20.8		2.8	
Males 65+	11.2		1.5	
Males 18+		**219.3**		**29.6%**
Females 18 - 34	125.3		16.9	
Females 35 - 49	57.8		7.8	
Females 50 - 64	21.9		3.0	
Females 65+	11.5		1.5	
Females 18+		**216.5**		**29.2**
Teens (12 - 17)	**88.1**		**11.9**	
Children (0 -11)	**217.5**		**29.3**	
TOTAL	**741.4**		**100.0%**	

Source: Strategy Research Corporation

Adult males make up 29.6% of the Hispanic population, while adult females make up 29.2% of the same population.

3. Country Of Origin

The Chicago Hispanic Market is composed of diverse Hispanic groups. That is, the Mexican-American population, growing at a much faster rate than that of the Puerto Rican population,-now represent 63% of all Hispanics in the area. Puerto Ricans make up 22%, while Cubans represent 3% and "Other Spanish" (Central, South Americans) account for approximately 11% of the total.

4. Spanish Media Availability

The Chicago Hispanic Market is served by a total of nine radio stations with Spanish language programming.

Furthermore, this Market has six newspapers/magazines aimed at the Hispanic reader.

	Approximate Number Serving The Area
Spanish Language Radio Stations	9
Spanish Language Television Stations	2
Spanish Language Local Newspapers/Magazines	6

Stations WCIU (Channel 26) and WBBS (Channel 60) of the Chicago area carry Spanish language programming.

5. Demographic Characteristics

Interesting comparisons exist between Hispanics in Chicago and those throughout the rest of the U.S. For example, Hispanics in Chicago are younger, with lower average educational achievement and occupational status than Hispanics nationwide. However, Hispanics in Chicago have higher family disposable income.

As income levels increased, so has the Hispanic consumer's shopping habits. That is, the Chicago Hispanic is now patronizing shopping malls and other retail establishments not frequented by them in the past. As more Hispanics gain employment in the managerial and professional ranks of the labor force, an increased acquisition of non-essential, luxury products occurs.

MARKET-6

SAN FRANCISCO

I. Population - 1985

With a Hispanic population in 1985 of approximately 717,200 persons, San Francisco is the sixth largest Hispanic Market in the United States.

From 1980 to 1985, the ADI's population has grown by 89,100 Hispanics, a 14% increase.

Hispanics in the San Francisco Market are not as geographically concentrated as are Latins in other markets. The largest Hispanic population resides in Santa Clara County, where 260,300 Hispanics live, or 36.3% of the total. Santa Clara is the home county (and Standard Metropolitan Statistical Area) of the City of San Jose.

SAN FRANCISCO MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Alameda	CA	88.9	130.0	149.9
Contra Costa West	CA	27.6	56.0	60.7
Lake	CA	0.6	1.9	2.3
Marin	CA	6.3	9.2	10.6
Mendocino	CA	1.8	3.7	4.3
Napa	CA	4.0	8.6	10.5
San Francisco	CA	55.1	83.4	93.8
San Mateo	CA	34.2	73.4	87.2
Santa Clara	CA	129.8	226.6	260.3
Solano West	CA	5.0	14.4	12.5
Sonoma	CA	9.5	20.9	25.1
TOTAL		362.8	628.1	717.2

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The next highest concentration of Hispanics is located in Alameda County (149,900) representing 21% of the Market's total. The City of Oakland is in Alameda County.

San Francisco and San Mateo Counties record the third and fourth highest levels of Hispanic population at 93,800 and 87,200 persons, respectively.

2. Age/Sex Of The Population

Like many of the major Hispanic markets, the Latin populous of the San Francisco ADI is young. That is, 36.6% are under 18 years of age, while a total of 68.6% are under 35 years of age.

SAN FRANCISCO
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	115.4		16.1%	
Males 35 - 49	57.5		8.0	
Males 50 - 64	34.4		4.8	
Males 65+	12.1		1.7	
Males 18+		**219.5**		**30.6%**
Females 18 - 34	114.1		15.9	
Females 35 - 49	61.6		8.6	
Females 50 - 64	38.1		5.3	
Females 65+	21.4		3.0	
Females 18+		**235.2**		**32.8**
Teens (12 - 17)	**86.0**		**12.0**	
Children (0 - 11)	**176.6**		**24.6**	
TOTAL	**717.2**		**100.0%**	

Source: Strategy Research Corporation

Approximately 31% of the Hispanic population is comprised of adult males, while nearly 33% are female. Approximately one-fourth are children 11 years or younger.

3. Country Of Origin

Approximately 62% of the Hispanic population of the San Francisco Market which, as previously mentioned includes the San Jose area, are of Mexican origin. Central and South Americans make up another 32% of the San Francisco Hispanics.

4. Language Spoken At Home

Approximately 53% of the Hispanic population of San Francisco report that Spanish is the language spoken in their home. Another 37% report that they speak both Spanish and English in their home.

5. Telephone Ownership

In the San Francisco Market, 22% of the Hispanic households do not have a phone. Additionally, 42% of Hispanic homes have unlisted telephone numbers.

	Percent
Households Without Telephones	22%
Households With Unlisted Phones	42
Total Listed Phone Homes	36
TOTAL	100%

Source: Strategy Research Corporation "Spanish Television Audience Research"

Well over one-third (36%) of San Francisco Hispanic households are listed in the telephone directory.

6. Spanish Media Availability

The San Francisco Market has five Spanish language radio stations including two stations from San Jose. The Market is also served by four Spanish language print media.

	Approximate Number Serving The Area
Spanish Language Radio Stations	6
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	4

Station KDTV (Channel 14), a SIN affiliate is the only Spanish language television station in this Market.

Slightly over one-third (34%) of the Hispanic households of the San Francisco Hispanic Market are wired for Cable Television.

MARKET-7

HOUSTON

1. Population - 1985

The Houston Market is the seventh largest Hispanic Market in the United States. The ADI consists of twenty counties, six of which comprise the Houston Standard Metropolitan Statistical Area.

The 1985 estimate of Hispanics living in the Houston ADI stands at 611,300 persons. A total of 464,800 (76.0%) of these Hispanics live in Harris County, home county for the City of Houston. In the five year period from 1980 to 1985, the Latin population has increased by 26.0%.

Eighty-nine percent of the Market's Hispanic population resides within the six county metro area. Overall, the metro is estimated to have a 1985 total population of approximately 3,500,000 persons, thus making the metropolitan area 15% Hispanic.

HOUSTON MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Austin	TX	0.3	1.0	1.3
Brazoria	TX	8.3	22.7	30.0
Calhoun	TX	4.9	6.7	7.5
Chambers	TX	0.3	0.6	0.8
Colorado	TX	1.5	2.7	3.1
Fort Bend	TX	11.8	26.7	37.7
Galveston	TX	14.3	23.6	27.0
Grimes	TX	0.7	1.2	1.5
Harris	TX	134.9	369.1	464.8
Jackson	TX	1.8	2.5	2.8
Liberty	TX	0.1	1.1	1.3
Matagorda	TX	4.3	8.0	10.1
Montgomery	TX	1.0	4.3	6.0
Polk	TX	0.2	0.9	1.2
San Jacinto	TX	0.1	0.1	0.1
Trinity	TX	0.0	*	0.1
Walker	TX	1.0	3.0	3.8
Waller	TX	0.2	1.1	1.4
Washington	TX	0.2	0.6	0.8
Wharton	TX	5.6	8.8	10.0
TOTAL		191.5	484.7	611.3

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The Hispanic Market exhibits a high degree of stability. Average length of residency among Hispanics in the market area is 17.5 years with approximately 40% living in the Houston area for more than twenty years. Additionally, about one-fourth of the Hispanics have always lived in Houston, while approximately one out of every three Hispanics previously lived somewhere else in Texas.

2. Age/Sex Of The Population

In terms of the age and sex profile of the Hispanic population in this Texas market, 40.1% are under the age of 18, while 73.5% of the population is under 35 years of age.

HOUSTON
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	105.1		17.2%	
Males 35 - 49	45.3		7.4	
Males 50 - 64	21.9		3.6	
Males 65+	11.8		1.9	
Males 18+		**184.1**		**30.1%**
Females 18 - 34	99.2		16.2	
Females 35 - 49	48.3		7.9	
Females 50 - 64	22.8		3.7	
Females 65+	12.0		2.0	
Females 18+		**182.3**		**29.8**
Teens (12 - 17)	**81.2**		**13.3**	
Children (0 - 11)	**163.7**		**26.8**	
TOTAL	**611.3**		**100.0%**	

Source: Strategy Research Corporation

Approximately 27% of Houston Hispanics are children between under twelve years of age.

The average number of persons per Hispanic household is 4.0. The average number of persons per non-Hispanic household is 2.8.

Almost three-fourths of the Hispanics living in the Houston area are U.S. citizens. With the relative youthfulness of this market and with the high level of permanency it exhibits, it is evident that substantial numbers of these residents are citizens by birth, as well as by naturalization.

3. Country Of Origin

With regard to ethnic background of the Latin population, approximately one out of every ten persons in the metro is of Mexican origin.

4. Language Spoken At Home

Approximately one-half of the Houston Hispanic population speaks Spanish, while another 40% speak both English and Spanish at home.

5. Spanish Media Availability

The Houston Market is served by four radio stations carrying Spanish language programming and one periodical directed at the Hispanic audience.

	Approximate Number Serving The Area
Spanish Language Radio Stations	4
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	1

Houston is currently served by one television station carrying Spanish language programming.

6. Employment Characteristics

An average of 1.4 persons per Hispanic household are employed full-time in Houston.

Over one-quarter of Hispanic male heads of household are employed in white collar occupations, while slightly more than one-half are blue collar workers. Nearly half of female heads of Hispanic households are housewives.

7. Education Levels

The median number of school years completed by heads of Hispanic households is 11.4. Over 40% are high school graduates, while approximately 20% graduated from college; 2% of which have gone on to post graduate work.

8. Home And Automobile Ownership

As to the housing profile, approximately three-quarters own their place of residence, while 30% rent.

Ninety percent own or lease automobiles; and the average number of automobiles per household is 1.9.

9. Credit Card Ownership

Two-thirds of Hispanic households in Houston have at least one credit card and the most popular type owned is the department store card. Almost six out of every ten have gas company cards and over 50% have Mastercard and/or Visa cards.

In addition, almost one out of every four own credit cards such as American Express, Carte Blanche or Diners Club.

10. Shopping Patterns

With regard to shopping patterns, approximately 85% of the local Hispanics shop in American supermarkets or grocery stores. Less than 15% do their shopping at a Mexican or Latin outlet, be it a supermarket or grocery store.

MARKET-8

McALLEN/BROWNSVILLE

1. Population - 1985

This southernmost Texas market is the nation's eighth largest Hispanic Market with a Hispanic population that exceeds half a million persons.

The ADI consists of four counties, each with substantial Hispanic populations.

Ninety-one percent of the Hispanic population in this market is concentrated in Hidalgo and Cameron Counties, both of which have shown, and the trend is expected to continue, tremendous growth in terms of Hispanic population. Hidalgo County boasts a Hispanic population of 289,700 persons, an increase of 26% over 1980's figure.

Cameron County, with a Hispanic population of 197,900 persons, has shown a growth of 22% from 1980.

McALLEN/BROWNSVILLE MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Cameron	TX	91.2	161.6	197.9
Hidalgo	TX	127.5	230.2	289.7
Starr	TX	15.1	26.4	34.0
Willacy	TX	10.7	14.0	16.2
TOTAL		244.5	432.2	537.8

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

On the other side of the Mexican border is the City of Matamoros, with an estimated population of 215,200. There is considerable commercial intercourse between these markets, swelling the overall consumption of consumer goods.

2. Age/Sex Of The Population

Typical of other Hispanic markets, the McAllen/Brownsville ADI is "young" in nature. Forty percent of the population is under 18 years of age and 68% is under 35 years of age.

McALLEN/BROWNSVILLE
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	71.5		13.3%	
Males 35 - 49	35.0		6.5	
Males 50 - 64	27.3		5.1	
Males 65+	14.6		2.7	
Males 18+		**148.4**		**27.6%**
Females 18 - 34	78.6		14.6	
Females 35 - 49	43.7		8.1	
Females 50 - 64	35.5		6.6	
Females 65+	18.9		3.5	
Females 18+		**176.7**		**32.8**
Teens (12 - 17)	**69.9**		**13.0**	
Children (0 - 11)	**142.8**		**26.6**	
TOTAL	**537.8**		**100.0%**	

Source: Strategy Research Corporation

In this Market there are 28,300 more adult Hispanic females than males (176,700 versus 148,400, respectively).

3. Country Of Origin

More than nine out of every ten (91.8%) of the Hispanics in the McAllen/Brownsville market are of Mexican origin. This subgroup dominates all other individual subgroups of Hispanics in this Market. This situation can, of course, be logically predicted due to the market's proximity to the Mexican border.

4. Language Spoken At Home

Fifty-three percent of the Hispanics in the McAllen/Brownsville Market speak Spanish at home, while 40% speak both English and Spanish at home.

5. Spanish Media Availability

The number of Spanish language radio stations serving the McAllen/Brownsville market is presently four. This Market is also served by one Spanish language periodical.

	Approximate Number Serving The Area
Spanish Language Radio Stations	4
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	1

The Spanish television audience is served in this area via a cable station, (K12TV), a SIN affiliate.

MARKET-9

ALBUQUERQUE

1. Population - 1985

The county with the largest population, Bernalillo, in which Albuquerque is located, also registers the highest Hispanic population (183,000 persons). Overall, the Hispanic populous accounts for 37% of the county's total population while the City of Albuquerque is 34% Hispanic.

The City of Santa Fe (in Santa Fe County) also records a population consisting of more than 55% Hispanic residents.

ALBUQUERQUE MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Apache North	AZ	1.2	1.4	2.1
Alamosa	CO	3.0	3.8	NA
Archuleta	CO	1.0	1.4	1.3
Conejos	CO	4.2	4.8	5.0
Costilla	CO	1.8	2.4	2.5
Dolores	CO	0.0	0.0	NA
La Plata	CO	2.5	3.1	3.4
Mineral	CO	NA	NA	*
Montezuma	CO	1.1	1.4	1.5
Rio Grande	CO	3.1	3.9	4.1
Saguache	CO	1.4	1.6	NA
Bernalillo	NM	91.9	154.6	183.0
Catron	NM	NA	NA	0.8
Cibola	NM	NA	NA	14.5
Colfax	NM	5.5	6.5	6.7
Grant	NM	10.3	13.5	14.0
Guadalupe	NM	3.5	3.7	3.9
Harding	NM	0.6	0.5	0.5
Lincoln	NM	2.0	2.9	3.3
Los Alamos	NM	1.6	2.0	2.2
McKinley	NM	4.3	7.5	8.2
Mora	NM	3.3	3.6	3.7
Otero	NM	NA	NA	10.0
Rio Arriba	NM	16.6	21.8	22.5
Sandoval	NM	5.3	9.6	10.9
San Juan	NM	NA	NA	11.0
San Miguel	NM	13.6	18.5	18.8
Santa Fe	NM	27.0	41.8	46.4
Sierra	NM	1.9	2.1	2.2

Continued. . .

ALBUQUERQUE MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985
(Continued)

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Socorro	NM	4.5	5.9	6.1
Taos	NM	12.1	12.5	13.1
Torrance	NM	2.3	3.1	3.5
Valencia	NM	16.6	26.9	17.0
TOTAL		242.2	360.5	422.2

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Seven New Mexico counties falling within the Albuquerque ADI are more than one-half Hispanic. Counties with high proportions of Hispanics include Santa Fe (55.6% Hispanic), Rio Arriba (74.4%), Grant (51.3%), San Miguel (81.4%), Taos (69.1%), Guadalupe (82.7%) and Mora (86.6% Hispanic).

Meanwhile, approximately 48% of Colfax County is comprised of Hispanics, while in Socorro and Torrance Counties Hispanics represent 45% and 41%, respectively of the county totals.

2. Age/Sex Of The Population

In terms of the age profile of the Hispanic population in this Market, 40.7% are under the age of 18.

ALBUQUERQUE
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	58.4		13.8%	
Males 35 - 49	27.9		6.6	
Males 50 - 64	21.5		5.1	
Males 65+	11.4		2.7	
Males 18+		**119.2**		**28.2%**
Females 18 - 34	60.5		14.3	
Females 35 - 49	32.1		7.6	
Females 50 - 64	25.5		6.0	
Females 65+	13.6		3.2	
Females 18+		**131.7**		**31.2**
Teens (12 - 17)	**57.6**		**13.7**	
Children (0 - 11)	**113.7**		**27.0**	
TOTAL	**422.2**		**100.0%**	

Source: Strategy Research Corporation

Meanwhile, nearly 69% of the Hispanics in Albuquerque are under 35 years of age.

3. Country Of Origin

The vast majority of Hispanics in the Albuquerque Market are of Mexican descent.

4. Spanish Media Availability

The Albuquerque Market which encompasses most of the State of New Mexico is served by nine Spanish language radio stations. The Market is also served in the area of print media by seven periodicals.

	Approximate Number Serving The Area
Spanish Language Radio Stations	9
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	7

A significant portion of the Albuquerque Spanish television market is served by a low power SIN affiliate, K48AM.

MARKET-10

EL PASO

1. Population - 1985

The Hispanic population of El Paso is currently 419,200 persons. This figure is more than double that of 1970 (204,400). El Paso County alone has experienced an increase of 188,000 Hispanic persons from 1970 to 1985. This represents an increase of approximately 116.0%.

The metropolitan population, which is defined as El Paso County, contains close to 83% of the Hispanics in the total El Paso ADI.

The Hispanic population of the El Paso ADI is over 57% of the total ADI population. Similarly, El Paso County is over 63% Hispanic. Since 1970, the Hispanic population has shown an increase of 57.9% while the non-Hispanic population has only increased 42.1%.

EL PASO MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
El Paso	TX	161.8	297.0	349.8
Hudspeth	TX	1.3	1.6	1.8
Dona Ana	NM	30.4	50.2	58.4
Luna	NM	4.2	6.2	6.7
Otero	NM	6.7	9.7	2.5
TOTAL		204.4	364.7	419.2

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

This market represents another "border market" which lies adjacent to Juarez, Mexico, a large city with a significant population and labor force.

2. Age/Sex Of The Population

Of all Hispanics in El Paso, 43.9% are under the age of 18, while the entire adult population between the ages of 18 and 49 only comprise 42.2% of all the Hispanics in this Market. El Paso is a relatively young market, for children under 12 make up nearly 30% of the Hispanic population.

EL PASO
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	53.3		12.7%	
Males 35 - 49	28.6		6.8	
Males 50 - 64	15.9		3.8	
Males 65+	8.4		2.0	
Males 18+		**106.2**		**25.3%**
Females 18 - 34	59.4		14.1	
Females 35 - 49	35.6		8.5	
Females 50 - 64	22.2		5.3	
Females 65+	11.7		2.8	
Females 18+		**128.9**		**30.7**
Teens (12 - 17)	**58.9**		**14.1**	
Children (0 - 11)	**125.2**		**29.9**	
TOTAL	**419.2**		**100.0%**	

Source: Strategy Research Corporation

Meanwhile, only 4.8% of the Hispanic population are adults over the age of 64.

In the adult market, the sex distribution is favored by women who comprise 30.7% of the adult population, while men constitute 25.3%.

3. Country Of Origin

By far, the predominant group of Hispanics in the El Paso Market are Mexicans which represent 95% of the Hispanic population. El Paso is, as previously mentioned, a border market with much contact with its neighboring city of Juarez, therefore, logically highly Mexican in nature.

4. Language Spoken At Home

Well over one-half (54%) of the Hispanics in the El Paso Market speak Spanish in the home. Both English and Spanish are spoken in the home by another 41% of the Hispanic population.

5. Spanish Media Availability

The El Paso Hispanic community is served by three radio stations with Spanish language programming.

	Approximate Number Serving The Area
Spanish Language Radio Stations	4
Spanish Language Television Stations	1

El Paso is also served by a Spanish language Cable Television station but also receives a signal from a station located in Juarez, Mexico.

In the El Paso Market, 27% of the Hispanic households have Cable T.V.

MARKET-11

FRESNO

1. Population - 1985

In 1985, Strategy Research Corporation estimates that the Hispanic population residing in the Fresno Market will total 369,100 persons, an increase of 203,100 persons or 122% since 1970. From 1980, the Market's Hispanic population will have increased by 25% or, 73,700 persons.

Fresno County, the largest county in the Fresno ADI, accounts for over half of the Hispanic population with 187,400 persons. By definition, this figure is consistant with the Fresno Standard Metropolitan Statistical Area population. The Hispanic population has grown 120% since 1970 from 84,800 to 187,400 persons. Of the Hispanics residing in Fresno County, slightly more than 10% make the City of Fresno their home, while the remainder live in areas outside of the central city limits.

FRESNO MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Fresno	CA	84.8	150.8	187.4
Kings	CA	12.8	19.8	24.3
Madera	CA	8.1	16.9	22.2
Mariposa	CA	0.7	0.5	0.8
Merced	CA	18.8	34.1	42.5
Tulare	CA	40.8	73.3	91.9
TOTAL		166.0	295.4	369.1

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

With nearly 1,170,000 total persons and 369,100 Hispanics, Latins currently comprise 31.5% of the total Fresno population.

2. Age/Sex Of The Population

Adults over the age of 50 make up only 12.3% of the Hispanic population of this market.

FRESNO
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	52.5		14.2%	
Males 35 - 49	25.4		6.9	
Males 50 - 64	14.6		4.0	
Males 65+	8.1		2.2	
Males 18+		100.6		27.3%
Females 18 - 34	53.9		14.6	
Females 35 - 49	27.0		7.3	
Females 50 - 64	14.7		4.0	
Females 65+	7.7		2.1	
Females 18+		103.3		28.0
Teens (12 - 17)	54.3		14.7	
Children (0 - 11)	110.9		30.0	
TOTAL	369.1		100.0%	

Source: Strategy Research Corporation

Hispanics under the age of 18 comprise 44.7% of the Hispanic population in Fresno. Furthermore, Latins under the age of 35 make up over 73% of the Market.

3. Country Of Origin

Virtually 95% of all Hispanics residing in the Fresno ADI are of Mexican origin.

4. Language Spoken At Home

Of all the West Coast and Southwest Markets, Fresno has the highest percentage of Hispanics speaking Spanish at home (61%). Another 29% report that they speak both English and Spanish at home.

5. Telephone Ownership

In the Fresno Market, 31% of the Hispanic households do not have a telephone. A similar proportion of households in this Market have unlisted telephones.

	Percent
Households Without Phones	31%
Households With Unlisted Phones	31
Total Listed Phone Homes	38
TOTAL	100%

Source: Strategy Research Corporation "Spanish Television Audience Research"

The total listed telephone households in Fresno make up 38% of the homes in this area.

6. Spanish Media Availability

The Fresno Hispanic Market is currently being served by three Spanish language radio stations.

	Approximate Number Serving The Area
Spanish Language Radio Stations	3
Spanish Language Television Stations	1

Fresno is served by one Spanish language television station, KFTV (Channel 21), a SIN affiliate.

MARKET-12

SAN DIEGO

1. Population - 1985

The San Diego Market is synonymous with the San Diego Standard Metropolitan Statistical Area which is comprised of San Diego County.

The Market has an estimated Hispanic population of 340,100, approximately one-half of which is located in the central city of San Diego.

Overall, the Market's Hispanic population is estimated to have increased by 23.5% over the 1980 Census recorded population figure of 275,200, to a 1985 total of 340,100 persons.

SAN DIEGO MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
San Diego	CA	102.5	275.2	340.1
TOTAL		102.5	275.2	340.1

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

2. Age/Sex Of The Population

More than one-half (52.7%) of the San Diego Market is under 18 years of age and 85.6% is under the age of 35.

SAN DIEGO
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	62.2		18.3%	
Males 35 - 49	24.6		7.2	
Males 50 - 64	11.7		3.4	
Males 65+	6.2		1.9	
Males 18+		**104.7**		**30.8%**
Females 18 - 34	49.7		14.6	
Females 35 - 49	28.5		8.4	
Females 50 - 64	14.3		4.2	
Females 65+	7.6		2.2	
Females 18+		**100.1**		**29.4**
Teens (12 - 17)	**43.9**		**12.9**	
Children (0 - 11)	**91.4**		**26.9**	
TOTAL	**340.1**		**100.0%**	

Source: Strategy Research Corporation

The adult Hispanic market in the San Diego ADI is rather evenly distributed in terms of sex: 30.8% are male, while 29.4% are female.

3. Country Of Origin

With regard to the composition of the Hispanic population, more than 83% of the populous is of Mexican origin, while less than 5% is of Puerto Rican origin.

4. Language Spoken At Home

Approximately 57% of the Hispanics in the San Diego Market speak Spanish while at home.

5. Spanish Media Availability

The San Diego Market is presently served by four Spanish language radio stations.

	Approximate Number Serving The Area
Spanish Language Radio Stations	4
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	1

Spanish speaking residents of the San Diego area can view Spanish language programming on XEWT, a Mexican television station.

6. Median Income

Median family income for this Market is approximately $20,053.

7. Education Levels

Approximately 12% of the San Diego Hispanics have completed 4 years of high school, while nearly 3.5% have completed 4 years or more of college.

MARKET-13

DALLAS/FT. WORTH

1. Population - 1985

Dallas/Ft. Worth is the thirteenth largest Hispanic Market in the United States. The 1985 estimate of Hispanics living in the Dallas/Ft. Worth ADI represents an increase of 21% over the 1980 population. Specifically, the number of Hispanics in this market will have increased from 267,600 in 1980 to 324,600 in 1985.

A total of 186,800 of these Hispanics are located in Dallas County, representing 57.5% of the total Hispanic ADI.

Tarrant County, adjacent to Dallas County, is the second highest Hispanic populated county in the Market. In 1985, Tarrant is expected to represent approximately 25% of the Market's Hispanic population base (83,000 persons).

DALLAS/FT. WORTH MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Anderson	TX	0.4	1.8	2.3
Bosque	TX	0.3	0.7	0.8
Collin	TX	3.0	7.2	9.5
Comanche	TX	0.7	1.3	1.5
Cooke	TX	0.2	0.6	0.7
Dallas	TX	61.4	154.6	186.8
Delta	TX	0.0	*	0.0
Denton	TX	1.7	6.4	8.6
Ellis	TX	3.3	5.8	7.1
Erath	TX	0.3	0.9	1.0
Fannin	TX	0.2	0.3	0.4
Franklin	TX	*	*	NA
Freestone	TX	0.1	0.3	0.4
Grayson	TX	0.6	1.3	1.5
Hamilton	TX	0.1	0.2	0.2
Henderson	TX	0.3	0.6	0.7
Hill	TX	1.1	1.4	1.6
Hood	TX	0.0	0.5	0.6
Hopkins	TX	0.1	0.4	0.5
Hunt	TX	0.6	1.3	1.5
Jack	TX	0.0	0.1	0.1
Johnson	TX	0.8	2.8	3.7
Kaufman	TX	0.8	1.7	2.1
Lamar	TX	0.1	0.4	0.4
Limestone	TX	0.2	0.7	0.9
Navarro	TX	0.6	1.5	1.7
Palo Pinto	TX	1.1	1.4	1.4
Parker	TX	0.6	1.4	1.6
Rains	TX	0.0	0.1	0.1
Rockwall	TX	0.1	0.5	0.6
Somervell	TX	0.1	0.3	0.4
Stephens	TX	0.0	0.6	NA

Continued. . .

DALLAS/FT. WORTH MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

(Continued)

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Tarrant	TX	31.0	67.6	83.0
Van Zandt	TX	0.3	0.6	0.7
Wise	TX	0.3	1.3	1.8
Wood	TX	NA	NA	0.3
Love	OK	0.0	1.0	0.1
TOTAL		110.4	267.6	324.6

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

To further illustrate the concentration of Hispanics, the Dallas/Ft. Worth Market, which includes Collin, Dallas, Denton, Ellis, Hood, Johnson, Kaufman, Parker, Rockwall, Tarrant and Wise Counties, contain 305,400 Hispanics, or 94.1% of all Hispnaics in the Dallas/Ft. Worth ADI. Approximately 9% of the total seven county metro population (3,420,000) is Hispanic.

2. Age/Sex Of The Population

Consistent with national trends, the age distribution within this Texas ADI is skewed relatively toward the younger groups. Over 40% of all Hispanics in the Dallas/Ft. Worth ADI are under 18 years of age, with an additional 34% between the ages of 18 and 34. Thus, 74% of the total Hispanic population are under the age of 35.

DALLAS/FT. WORTH
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	55.4		17.1%	
Males 35 - 49	23.8		7.3	
Males 50 - 64	11.0		3.4	
Males 65+	6.0		1.8	
Males 18+		**96.2**		**29.6%**
Females 18 - 34	54.8		16.9	
Females 35 - 49	25.7		7.9	
Females 50 - 64	11.3		3.5	
Females 65+	6.2		1.9	
Females 18+		**98.0**		**30.2**
Teens (12 - 17)	**42.1**		**13.0**	
Children (0 -11)	**88.3**		**27.2**	
TOTAL	**324.6**		**100.0%**	

Source: Strategy Research Corporation

The proportion of adult males 18+ in this Market is similar to that of females 18+ (96,200 versus 98,000, respectively).

The average Hispanic household in Dallas County is 50% larger than its non-Hispanic counterpart. The mean number of persons per Hispanic household is 4.1; compared with 2.7 members per non-Hispanic home. Tarrant County shows a similar pattern with Spanish homes averaging 4.3 residents, and non-Spanish homes averaging 2.8.

3. Country Of Origin

The Dallas/Ft. Worth Hispanic community is principally of Mexican origin or parentage. That is, almost nine out of every ten Hispanics in the Market area is a Mexican.

4. Language Spoken At Home

The Hispanic population of Dallas-Ft. Worth exhibits a high degree of bilingualism. While at home, 41% speak Spanish most frequently, and another 29% speak Spanish and English equally.

5. Spanish Media Availability

The Dallas-Ft. Worth Market has three Spanish language radio stations and is served by a weekly Spanish language newspaper.

	Approximate Number Serving The Area
Spanish Language Radio Stations	3
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	1

Television Station KNBN serves the Dallas Hispanic community.

6. Length Of Residence Of Head Of Household

The Market exhibits a high degree of permanency. The Hispanic head of household has resided in Dallas-Ft. Worth for an average of 16.5 years. Fully 34% of the household heads have lived in the area for 20 years or more.

7. Education Levels

The median level of educational attainment for Hispanic heads of households is 11.3 years. More than 35% are high school graduates.

8. Automobile And Home Ownership

Ninety-five percent of Hispanic households own at least one automobile, and the average number of cars per household is 2.0.

More than two out of three Hispanic households own their own home.

9. Credit Card Ownership

The Dallas-Ft. Worth Hispanic Market exhibits strong signs of creditworthiness. Nearly two-thirds of the Hispanics possess one or more credit cards. The most popular types are department store cards and Mastercard/Visa cards.

10. Supermarket Patronage

American supermarkets are the preferred stores for grocery purchasing, as more than 80% of Hispanics do their grocery shopping at this type of outlet.

MARKET-14

PHOENIX

1. Population - 1985

In 1985, Hispanic population in the Phoenix Market is projected at 317,600 persons. This represents an increase of 24% over the 1980 total.

A total of 246,500 of these Hispanics (78%) are located in Maricopa County (equivalent to the Phoenix Standard Metropolitan Statistical Area). A total of 15% of Maricopa's Hispanic population resides within the City of Phoenix while the remainder live in areas outside of the central city.

With regard to the type of Hispanics in the area, approximately nine out of every ten Hispanics in the metro are of Mexican descent.

PHOENIX MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Coconino	AZ	NA	NA	8.0
Gila	AZ	5.9	7.7	8.7
Greenlee	AZ	3.4	5.4	6.1
Maricopa	AZ	100.9	199.0	246.5
Mohave	AZ	0.9	2.3	2.9
Navajo	AZ	3.2	4.5	5.1
Pinal	AZ	18.6	26.8	30.9
Yavapai	AZ	2.8	4.2	4.9
Riverside East	CA	2.1	4.9	4.5
San Bernardino East	CA	0.8	1.5	NA
TOTAL		138.6	256.3	317.6

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Pinal County is the ADI's second most Hispanic populated county with an estimated 30,900 persons. This county has experienced a growth of 15% in Hispanic population from 1980 to 1985.

2. Age/Sex Of The Population

With regard to the age/sex profile of the Phoenix ADI, 45.2% of the populous is under 18 years of age with 31.5% being children under 12. An additional 29.4% of the Market's Hispanics are between the ages of 18 and 34. Thus, fully three-fourths of the ADI's Hispanic population is under 35 years of age.

PHOENIX
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	46.5		14.6%	
Males 35 - 49	19.7		6.2	
Males 50 - 64	13.0		4.1	
Males 65+	5.4		1.7	
Males 18+		**84.6**		**26.6%**
Females 18 - 34	47.0		14.8	
Females 35 - 49	22.1		6.9	
Females 50 - 64	14.0		4.4	
Females 65+	6.6		2.1	
Females 18+		**89.7**		**28.2**
Teens (12 - 17)	**43.4**		**13.7**	
Children (0 - 11)	**99.9**		**31.5**	
TOTAL	**317.6**		**100.0%**	

Source: Strategy Research Corporation

Adult Hispanic males 18+ account for 26.6% of the total Hispanic population, whereas females 18+ represent 28.2% of the adult population.

3. Country Of Origin

The Mexican community dominates the Hispanic population of Phoenix. Almost nine out of every ten Hispanics in the Phoenix market are of Mexican origin.

4. Language Spoken At Home

Approximately 53% of the Phoenix Hispanics report that they speak Spanish when at home. Roughly 35% claim that they speak both Spanish and English at home.

5. Telephone Ownership

With regard to telephone ownership, 39% of Phoenix Hispanic households do not have a telephone. An additional 32% have unlisted phones.

	Percent
Households Without Telephones	39%
Households With Unlisted Phones	32
Total Listed Phone Homes	29
TOTAL	100%

Source: Strategy Research Corporation
Spanish Television Audience Research

6. Spanish Media Availability

A total of five radio stations in the Phoenix area have Spanish language programming.

	Approximate Number Serving The Area
Spanish Language Radio Stations	5
Spanish Language Televeision Stations	1
Spanish Language Local Newspapers/Magazines	1

The Phoenix ADI is covered by station KTVW (Channel 33), a SIN affiliate.

Twelve percent of the Phoenix Hispanic households are wired for Cable Television.

MARKET-15

SACRAMENTO/STOCKTON

1. Population - 1985

This California Market is projected to have a Hispanic population of approximately 307,300 persons in 1985, making it the fifteenth largest Hispanic ADI in the United States.

The ADI county with the highest Hispanic population is Sacramento (92,600) followed by San Joaquin with 82,700 persons. Stanislaus County registers as the third most Hispanic populated county within the ADI as 50,700 persons are expected to reside within the defined boundaries in 1985.

SACRAMENTO/STOCKTON MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Amador	CA	0.5	0.9	1.0
Calaveras	CA	0.5	0.9	1.2
Colusa	CA	1.8	2.5	3.0
Contra Costa East	CA	4.9	5.1	4.7
El Dorado West	Ca	1.3	4.0	2.9
Mono	CA	0.0	0.4	NA
Nevada	CA	0.5	1.5	2.2
Placer West	CA	4.5	8.2	8.6
Plumas	CA	0.2	0.6	0.8
Sacramento	CA	37.4	74.1	92.6
San Joaquin	CA	37.3	66.6	82.7
Sierra	CA	0.2	0.2	0.2
Solano East	CA	5.5	24.8	18.2
Stanislaus	CA	18.8	40.0	50.7
Sutter	CA	2.4	6.1	7.6
Toulumne	CA	1.0	1.8	2.2
Yolo	CA	11.0	19.3	23.4
Yuba	CA	2.2	4.4	5.3
TOTAL		130.0	261.4	307.3

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Since 1980, when Hispanics in the Sacramento/Stockton Market numbered 261,400, the population has increased by 45,900 Hispanics, a growth of 18% for the five year period.

2. Age/Sex Of The Population

In this very young market, only 14% of the population is over the age of 49.

SACRAMENTO/STOCKTON
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	46.0		15.0%	
Males 35 - 49	24.3		7.9	
Males 50 - 64	15.0		4.9	
Males 65+	7.4		2.4	
Males 18+		**92.7**		**30.2%**
Females 18 - 34	45.2		14.7	
Females 35 - 49	24.0		2.8	
Females 50 - 64	13.3		4.3	
Females 65+	7.3		2.4	
Females 18+		**89.8**		**29.2**
Teens (12 - 17)	**41.1**		**13.4**	
Children (0 - 11)	**83.7**		**27.2**	
TOTAL	**307.3**		**100.0%**	

Source: Strategy Research Corporation

Approximately 41% of all Hispanics in the Market are under 18 years of age, with an additional 30% under the age of 35.

3. Country Of Origin

In the Sacramento/Stockton area the predominant subgroup of Hispanics is that of Mexicans. This subsection of the Hispanic community accounts for 80% of the area Hispanics.

4. Language Spoken At Home

Approximately 54% of the Hispanics in the Sacramento/Stockton area speak Spanish in the home.

5. Telephone Ownership

About one-quarter (24%) of the Hispanic households in Sacramento do not own a telephone. Another one-third have unlisted telephone numbers.

Forty-three percent of the Hispanic households in the area have listed telephones.

	Percent
Households Without Phones	24%
Households With Unlisted Phones	33
Total Listed Phone Homes	43
TOTAL	100%

Source: Strategy Research Corporation "Spanish Television Audience Research"

6. Spanish Media Availability

The Sacramento/Stockton area is served by three Spanish language radio stations and two Spanish language periodicals.

	Approximate Number Serving The Area
Spanish Language Radio Stations	3
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	2

The Hispanic television audience of the area is currently served by one Spanish language station, KCSO (Channel 19), a SIN affiliate.

The Sacramento market has a Cable Television penetration of approximately 15%.

MARKET-16

CORPUS CHRISTI

1. Population - 1985

Corpus Christi is a Texas city located on the southeastern coast of the State. It is the sixteenth largest Hispanic Market in the United States. The eleven counties which make up the Corpus Christi ADI contain 283,100 Hispanic persons. This is an increase of over 66% since 1970 (169,800 in 1970).

Hispanics constitute over 54% of the total Corpus Christi ADI population, which is estimated to be 517,000.

CORPUS CHRISTI MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Aransas	TX	1.7	2.7	3.4
Bee	TX	7.4	11.9	14.0
Brooks	TX	6.1	7.2	7.7
Duval	TX	8.8	10.7	11.7
Jim Hogg	TX	3.7	4.7	5.0
Jim Wells	TX	17.8	24.5	29.0
Kenedy	TX	0.5	0.5	0.5
Kleberg	TX	12.8	17.4	20.0
Nueces	TX	87.8	131.3	155.8
Refugio	TX	3.0	3.6	3.9
San Patricio	TX	20.2	26.9	32.1
TOTAL		169.8	241.4	283.1

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The metropolitan area which consists of Nueces and San Patricio Counties, contains more than 66% of the Latins (187,900 persons) in the Corpus Christi ADI. Nueces County alone constitutes over half of the Hispanic population in this ADI.

2. Age/Sex Of The Population

Nearly 41% of the Hispanic Market in Corpus Christi is under the age of 18. Additionally, 69.5% are under the age of 35.

CORPUS CHRISTI
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	40.0		14.1%	
Males 35 - 49	18.1		6.4	
Males 50 - 64	13.9		4.9	
Males 65+	7.4		2.6	
Males 18+		**79.4**		**28.0%**
Females 18 - 34	40.7		14.4	
Females 35 - 49	22.4		7.9	
Females 50 - 64	16.0		5.7	
Females 65+	8.6		3.0	
Females 18+		**87.7**		**31.0**
Teens (12 - 17)	**38.4**		**13.6**	
Children (0 - 11)	**77.6**		**27.4**	
TOTAL	**283.1**		**100.0%**	

Source: Strategy Research Corporation

Adult men make up 28% of the Hispanic population, while adult women comprise 31%.

3. Country Of Origin

Corpus Christi is another community where the Mexican population dominates the overall Hispanic population. Over 95% of the Hispanics of this market are Mexican.

4. Language Spoken At Home

Slightly over one-half (52%) of the Hispanics in Corpus Christi speak Spanish at home. Approximately 37% speak both English and Spanish at home.

5. Telephone Ownership

Slightly over one-quarter (26%) of Hispanic households in the Corpus Christi Market do not have a phone. Further, 27% have unlisted telephone numbers.

	Percent
Households Without Telephones	26%
Households With Unlisted Phones	27
Total Listed Phone Homes	47
TOTAL	100%

Source: Strategy Research Corporation "Spanish Television Audience Research"

Forty-seven percent of the Hispanic households in the Market have listed telephones.

6. Spanish Media Availability

Corpus Christi is served by two radio stations featuring Spanish language programming.

	Approximate Number Serving The Area
Spanish Language Radio Stations	2
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	1

Station KORO (Channel 28), a SIN affiliate, is the only Spanish language television station in Corpus Christi.

Cable Television penetration in the Corpus Christi Market is approximately 44% for Hispanic households.

MARKET-17

DENVER

1. Population - 1985

The Denver, Colorado Market is the nation's seventeenth largest Hispanic populated market. The area, which includes portions of Colorado, Nebraska and Wyoming, has a Hispanic population of 253,700 persons in 1985. This represents an increase in population of 15% since the 1980 Census and an increase of 102% since the 1970 Census.

DENVER MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Adams	CO	18.7	38.5	44.0
Alamoso	CO	NA	NA	4.0
Arapahoe	CO	4.8	12.5	15.5
Boulder	CO	5.7	10.3	11.9
Chaffee	CO	0.8	1.3	1.3
Clear Creek	CO	0.3	0.3	0.3
Denver	CO	62.6	92.0	95.8
Douglas	CO	0.1	0.6	0.8
Eagle	CO	1.7	0.8	1.0
Elbert	CO	0.0	0.1	0.2
Garfield	CO	0.4	0.9	1.1
Gilpin	CO	0.0	*	0.1
Grand	CO	1.1	0.3	0.3
Gunnison	CO	0.2	0.3	0.4
Hinsdale	CO	NA	NA	0.0
Jackson	CO	0.1	*	0.1
Jefferson	CO	5.7	19.5	23.8
Kit Carson	CO	0.0	0.4	0.4
Lake	CO	1.6	2.1	2.3
Larimer	CO	4.4	8.8	10.0
Lincoln	CO	NA	NA	0.1
Logan	CO	NA	NA	1.4
Moffat	CO	0.3	0.7	0.8
Morgan	CO	1.7	2.7	2.9
Park	CO	0.0	0.1	0.2
Phillips	CO	0.0	0.1	0.1
Pitkin	CO	0.0	0.1	0.2
Prowers	CO	NA	NA	2.7
Rio Blanco	CO	0.1	0.2	0.2
Routt	CO	0.2	0.4	0.4
Sedgwick	CO	NA	NA	0.3
Summit	CO	0.0	0.2	0.2

Continued. . .

DENVER MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985
(Continued)

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Teller	CO	NA	NA	0.2
Washington	CO	0.0	*	0.1
Weld	CO	10.8	21.0	23.8
Yuma	CO	0.0	0.2	0.3
Cheyenne	NE	0.1	0.2	0.3
Dawes	NE	0.0	0.2	0.2
Keith	NE	0.0	0.4	0.4
Kimball	NE	0.0	0.2	0.2
Albany	WY	1.9	1.9	2.0
Campbell	WY	0.0	0.6	NA
Carbon	WY	2.2	2.5	2.7
Johnson	WY	0.0	*	NA
Platte	WY	0.0	0.6	0.7
Niobrara	WY	NA	NA	0.0
TOTAL		125.5	221.0	253.7

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

About 95,800 Hispanics (38% of the ADI total) reside in the City of Denver/Denver County. Meanwhile, the Metropolitan Statistical Area which includes the seven counties of Adams, Arapahoe, Boulder, Denver, Douglas, Gilpin and Jefferson, houses three-fourths of the Market's Hispanic population (191,900 persons).

2. Age/Sex Of The Population

Consistent with national patterns, the Hispanic residents of the Denver Market are younger than their non-Hispanic counterparts. Approximately 74% of the Market total Hispanic population is under the age of 35 with 39% under 18 years of age.

DENVER
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	42.6		16.8%	
Males 35 - 49	19.3		7.6	
Males 50 - 64	8.4		3.3	
Males 65+	4.6		1.8	
Males 18+		**74.9**		**29.5%**
Females 18 - 34	44.6		17.6	
Females 35 - 49	20.0		7.9	
Females 50 - 64	9.7		3.8	
Females 65+	5.2		2.1	
Females 18+		**79.5**		**31.4**
Teens (12 - 17)	**32.0**		**12.6**	
Chlidren (0 - 11)	**67.3**		**26.5**	
TOTAL	**253.7**		**100.0%**	

Source: Strategy Research Corporation

Adult Hispanic males account for 30% of the Market's population; similar to the adult female popoulation which comprises 31% of the Hispanic population.

3. Country Of Origin

The vast majority of the Hispanic population of the Denver area is of Mexican descent.

4. Spanish Media Availability

The Denver Market Hispanic community is served by two Spanish language radio stations and one major Spanish language periodical.

	Approximate Number Serving The Area
Spanish Language Radio Stations	2
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	1

The Spanish television audience of the Denver Market is served by a low power television station; K40AC, a SIN affiliate.

5. Hispanic Businesses

According to the last U.S. Census of Hispanic businesses (1977), there were 659 Hispanic-owned firms located within Denver's environs. These firms represented annual receipts in excess of $31 million. Since the Census reporting period, it is estimated that the number of Hispanic-owned firms has increased to over 1,000 with annual receipts in excess of $40 million.

MARKET-18

PHILADELPHIA

1. Population - 1985

Although approximately only 3% of the total population of the Philadelphia Market is Hispanic, this relatively small percentage actually represents a significant number.

From 1970 to 1985 the Hispanic population of this Market has more than tripled, from 71,200 in 1970 to 225,000 in 1985. In fact, Hispanic population growth has even been substantial for the five years between 1980 and 1985 as a 24% increase in Hispanic Market population is seen.

PHILADELPHIA MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Kent	DE	1.0	1.7	2.0
New Castle	DE	4.6	7.1	8.3
Atlantic	NJ	2.6	7.6	9.6
Burlington	NJ	2.6	8.7	11.1
Camden	NJ	7.3	20.6	26.4
Cape May	NJ	0.6	1.2	1.4
Cumberland	NJ	5.5	12.5	15.5
Gloucester	NJ	1.0	2.4	2.8
Mercer	NJ	3.3	10.6	13.7
Salem	NJ	0.4	1.0	1.3
Warren	NJ	0.6	0.1	1.1
Berks	PA	2.7	9.0	11.0
Bucks	PA	1.7	5.7	7.1
Chester	PA	1.4	5.7	7.0
Delaware	PA	3.0	4.2	4.3
Lehigh	PA	1.0	7.1	9.2
Monroe	PA	0.1	0.6	0.7
Montgomery	PA	1.3	5.4	6.6
Northampton	PA	3.2	7.0	8.6
Philadelphia	PA	27.3	63.8	77.3
TOTAL		71.2	182.0	225.0

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Philadelphia County contains 34.4% of the Hispanic population of the ADI (77,300 persons). Other counties with sizable numbers of Latins are Camden, Cumberland and Mercer with populations of 26,400, 15,500 and 13,700, respectively. These three counties are located in the New Jersey portion of the ADI.

The Philadelphia ADI encompasses the Philadelphia Standard Metropolitan Statistical Area. The counties in the SMSA include Burlington, Camden, Gloucester, Bucks, Chester, Delaware, Montgomery and Philadelphia. Thus, Hispanic population of the SMSA is 63% of that for the ADI. Approximately 55% of the metro Hispanics live in the City of Philadelphia, while the remainder have chosen residency outside of the central city.

2. Age/Sex Of The Population

As is the case with most ADI's with large Hispanic concentrations, the Hispanic population of the Philadelphia ADI is very young. Almost 72% of these Hispanics are under 35 years of age, while well over a third (37.8%) are under the age of 18.

PHILADELPHIA
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	37.9		16.8%	
Males 35 - 49	16.6		7.4	
Males 50 - 64	8.7		3.9	
Males 65+	4.8		2.1	
Males 18+		**68.0**		**30.2%**
Females 18 - 34	38.3		17.0	
Females 35 - 49	17.6		7.8	
Females 50 - 64	10.5		4.7	
Females 65+	5.7		2.5	
Females 18+		**72.1**		**32.0**
Teens (12 - 17)	**26.2**		11.7	
Children (0 - 11)	**58.7**		**26.1**	
TOTAL	**225.0**		**100.0%**	

Source: Strategy Research Corporation

Adults over the age of 49 make up only 13.2% of the Hispanic population.

3. Country Of Origin

With regard to ethnic composition, more than two-thirds of the metro is of Puerto Rican origin. Mexican-Americans account for 8% of the Hispanic population, while Cuban representation is less than 5%.

4. Language Spoken At Home

Roughly seven out of every ten Hispanics in Philadelphia speak Spanish in their homes.

5. Spanish Media Availability

The Philadelphia Hispanic population is served by two stations with Spanish language programming.

	Approximate Number Serving The Area
Spanish Language Radio Stations	2
Spanish Language Television Stations	1

A Low Power Television Station, W35AB which receives its signal from WXTV (Channel 41) the SIN affiliate in New York, provides the Philadelphia Hispanic community with Spanish language programming.

MARKET-19

TUCSON

1. Population - 1985

The Tucson ADI is presently comprised of seven counties which contain 191,700 Hispanics. This figure represents approximately one-quarter of the total population. The vast majority (72%) of these Hispanics (138,100) reside in Pima County, which is in essence the Tucson metro area.

Santa Cruz County is a highly Hispanic county with its 17,800 Hispanics accounting for 82.6% of the population.

TUCSON MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Apache South	AZ	0.2	0.6	0.4
Cochise	AZ	15.1	22.9	25.6
Pima	AZ	55.5	111.4	138.1
Graham	AZ	NA	NA	6.3
Santa Cruz	AZ	8.2	15.2	18.3
Catron	NM	0.6	0.8	NA
Hidalgo	NM	2.4	2.8	3.0
TOTAL		82.0	153.7	191.7

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Over the past 15 years, the Tucson Market has experienced substantial growth in its Hispanic population. The number of Hispanic persons more than doubled during this time period - from 82,000 in 1970 to the 1985 figure of 191,700.

2. Age/Sex Of The Population

Adult males comprise 29.5% of the Tucson Hispanic population, compared with 31.5% for adult females.

TUCSON
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	30.3		15.8%	
Males 35 - 49	13.6		7.1	
Males 50 - 64	8.2		4.3	
Males 65+	4.4		2.3	
Males 18+		**56.5**		**29.5%**
Females 18 - 34	30.7		16.0	
Females 35 - 49	14.3		7.5	
Females 50 - 64	9.9		5.2	
Females 65+	5.4		2.8	
Females 18+		**60.3**		**31.5**
Teens (12 - 17)	**23.0**		**12.0**	
Children (0 - 11)	**51.9**		**27.0**	
TOTAL	**191.7**		**100.0%**	

Source: Strategy Research Corporation

Approximately seven out of every ten Hispanics in the Tucson Market are under the age of 35. Twenty-seven percent of the Hispanic population are children under the age of 12, and 12% are teenagers between 12 and 17 years of age.

3. Country Of Origin

The Hispanics in this Arizona Market are predominantly Mexican, as more than nine out of every ten claim they are of Mexican origin or descent.

4. Language Spoken At Home

Approximately **54%** of the Hispanics in the Tucson area report that in their homes they speak Spanish. About one-third more report that they speak both English and Spanish in the home.

5. Spanish Media Availability

A total of four radio stations featuring Spanish language broadcasting serve the Tucson area.

	Approximate Number Serving The Area
Spanish Language Radio Stations	4
Spanish Language Television Stations	1

The Spanish television audience is served in Tucson by K40AC, a low power television station which receives its signal from KTVW (Channel 33), the SIN affiliate in Phoenix.

MARKET-20

SALINAS/MONTEREY

1. Population - 1985

The Hispanic population of the Salinas/Monterey Market more than doubled in the ten year period from 1970 to 1980 (55,300 to 114,200). In this same period of time, the non-Hispanic population rose 29%, from 389,500 persons to 503,600.

Meanwhile, the Market registers an increase of 27,000 Hispanic persons in the 1980 - 1985 time period, an increase of 24%.

SALINAS/MONTEREY MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Monterey	CA	38.1	75.1	91.0
San Benito	CA	6.4	11.4	14.1
Santa Cruz	CA	10.8	27.7	36.1
TOTAL		55.3	114.2	141.2

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

More than one-fourth of Monterey County is made up of Hispanics, while 46% of San Benito County and 15% of Santa Cruz County consists of persons of Hispanic origin.

2. Age/Sex Of The Population

More than one-third (36.5%) of the Hispanics residing in the Salinas/Monterey Market are under 18 years of age.

SALINAS/MONTEREY
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	30.6		21.7%	
Males 35 - 49	9.8		7.0	
Males 50 - 64	5.7		4.0	
Males 65+	3.0		2.1	
Males 18+		**49.1**		**34.8%**
Females 18 - 34	21.7		15.4	
Females 35 - 49	9.9		7.0	
Females 50 - 64	5.8		4.1	
Females 65+	3.1		2.2	
Females 18+		**40.5**		**28.7**
Teens (12 - 17)	**16.1**		**11.4**	
Children (0 - 11)	**35.5**		**25.1**	
TOTAL	**141.2**		**100.0%**	

Source: Strategy Research Corporation

Adult males comprise 34.8% of the Market's Hispanic population, while females constitute 28.7% of the total Hispanic population.

3. Country Of Origin

With regard to type of Hispanic origin, approximately 90% of the Hispanics making up the area are Mexican-Americans.

4. Language Spoken At Home

Spanish is the spoken language in the great majority (58%) of Hispanic households in the Salinas/Monterey area.

5. Telephone Ownership

A large portion (46%) of the Hispanic households in Salinas do not have telephones. Another 29% of Hispanic households have unlisted telephones.

	Percent
Households Without Phones	46%
Households With Unlisted Phones	29
Total Listed Phone Homes	25
TOTAL	100%

Source: Strategy Research Corporation "Spanish Television Audience Research"

One-quarter of the Hispanic households in this Market have listed telephones.

6. Spanish Media Availability

In the Salinas/Monterey area, the Hispanic community is served by three radio stations broadcasting Spanish language programming.

	Approximate Number Serving The Area
Spanish Language Radio Stations	3
Spanish Language Television Stations	1

Station KCBA (Channel 35), a SIN affiliate, is the only Spanish language television station in the Salinas/Monterey market.

The Salinas Hispanic Market has relatively high incidence of Cable Television penetration. Roughly 44% of the Hispanic households of this Market have Cable TV.

MARKET-21

AUSTIN

1. Population - 1985

The Austin ADI, located in the southwestern portion of Texas, is comprised of eleven counties, with 138,000 Hispanic persons residing within. The Hispanic population has grown 138% in the 15 years between 1970 and 1985 (58,000 to 138,000).

AUSTIN MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Bastrop	TX	2.1	3.4	4.3
Blanco	TX	0.4	0.4	0.5
Burnet	TX	0.7	1.3	1.6
Caldwell	TX	5.8	7.8	8.8
Fayette	TX	0.3	1.0	1.2
Hays	TX	9.0	12.4	15.2
Lee	TX	0.1	0.6	0.8
Llano	TX	0.1	0.3	0.3
Mason	TX	0.4	0.6	0.7
San Saba	TX	0.7	0.8	NA
Travis	TX	33.5	72.3	91.5
Williamson	TX	4.9	9.7	13.1
TOTAL		58.0	110.6	138.0

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Latins represent 17.6% of the total Market population. Travis County, which encompasses the City of Austin, has 91,500 Hispanic persons. The tri-county metropolitan area (Travis, Hays and Williamson Counties) make up 86.8% of the Hispanic population in the Austin Market. Latins make up 18.5% of the total metro population (782,400).

2. Age/Sex Of The Population

Approximately 35% of the Hispanic population is between the ages of 18 and 34, while 39% are under the age of 18.

AUSTIN
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	24.3		17.6%	
Males 35 - 49	8.5		6.2	
Males 50 - 64	5.4		3.9	
Males 65+	2.8		2.0	
Males 18+		**41.0**		**29.7%**
Females 18 - 34	23.3		16.9	
Females 35 - 49	9.6		7.0	
Females 50 - 64	6.7		4.9	
Females 65+	3.5		2.5	
Females 18+		**43.1**		**31.3**
Teens (12 - 17)	**16.3**		**11.8**	
Children (0 - 11)	**37.6**		**27.2**	
TOTAL	**138.0**		**100.0%**	

Source: Strategy Research Corporation

The adult Hispanic market in the Austin ADI is somewhat equal in terms of sex with 29.7% being male and 31.3% female.

3. Country Of Origin

The predominant group of Hispanics in Austin is, as in all of Texas, the Mexican community. Mexicans represent over 90% of the Hispanics in this market.

4. Language Spoken At Home

Roughly 51% of the Austin Hispanic population speak Spanish in their homes. An additional 38% speak both English and Spanish at home.

5. Spanish Media Availability

The Austin Hispanic Market is currently served by two radio stations featuring Spanish language broadcasts.

	Approximate Number Serving The Area
Spanish Language Radio Stations	2
Spanish Language Television Stations	1

The Spanish television audience of Austin is covered by a low power television station, K42AB, which receives its signal from KWEX (Channel 41), the SIN affiliate in San Antonio.

MARKET-22

BOSTON

1. Population - 1985

In the decade period 1970 - 1980, the Hispanic population in the Boston Market doubled in size (51,900 persons versus 109,600 persons). Hispanic population growth continues as an increase of 20% is seen for the 1980 - 1985 period.

The Boston ADI is comprised of sixteen counties. Suffolk County, Massachusetts records the highest concentration of Hispanic population at 48,600 persons, while the second largest penetration of Hispanics is in Middlesex County, Massachusetts (28,000 persons of Hispanic origin).

BOSTON MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Barnstable	MA	1.0	1.0	1.3
Essex	MA	5.9	16.9	20.1
Middlesex	MA	12.8	23.5	28.0
Nantucket	MA	*	*	0.0
Norfolk	MA	3.5	4.6	4.9
Plymouth	MA	2.3	4.4	5.0
Suffolk	MA	19.0	40.1	48.6
Worcester	MA	5.3	14.2	17.7
Belknap	NH	NA	NA	0.2
Cheshire	NH	0.2	0.2	0.3
Hillsborough	NH	0.9	2.2	2.4
Merrimack	NH	0.3	0.4	0.5
Rockingham	NH	0.6	1.2	1.3
Stafford	NH	0.1	0.5	0.5
Sullivan	NH	*	0.1	0.1
Windham	VT	*	0.3	0.3
TOTAL		51.9	109.6	131.2

* Designates a Hispanic population of less than 100 persons.

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The City of Boston, located in Suffolk County, represents approximately 90% of the county's Hispanic population.

2. Age/Sex Of The Population

There are approximately the same number of adult Hispanic males as there are females in the Boston Market, each representing approximately 32% of the area's total Hispanic population.

BOSTON
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	27.0		20.6%	
Males 35 - 49	9.5		7.2	
Males 50 - 64	3.8		2.9	
Males 65+	2.1		1.6	
Males 18+		42.4		32.3%
Females 18 - 34	25.1		19.1	
Females 35 - 49	9.6		7.3	
Females 50 - 64	5.2		4.0	
Females 65+	2.7		2.1	
Females 18+		42.6		32.5
Teens (12 - 17)	13.6		10.4	
Children (0 - 11)	32.6		24.8	
TOTAL	131.2		100.0%	

Source: Strategy Research Corporation

Children under 12 represent one-fourth of the Market's Hispanic population, while an additional 10% are between 12 and 17 years of age.

3. Country Of Origin

The Hispanic Market in the Boston area is somewhat diverse, however, the single largest national group is the Puerto Rican community, which represents 45% of the Hispanic population. Dominicans and Central and South Americans represent an additional 41% of the Boston area Hispanics.

4. Spanish Media Availability

The Boston area is served by two Spanish language radio stations.

	Approximate Number Serving The Area
Spanish Language Radio Stations	2
Spanish Language Local Newspapers/Magazines	3

The Hispanic Market is also served by three Spanish language periodicals.

MARKET-23

LUBBOCK

1. Population - 1985

The Hispanic population of the Lubbock Market more than doubled in the 15 year period from 1970 to 1985 (62,000 to 124,700). The Lubbock metropolitan area (Lubbock County) is 21.5% Hispanic with 48,700 Latins and 177,800 non-Hispanics. The total Lubbock Market is 27.1% Hispanic.

LUBBOCK MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Bailey	TX	1.9	2.8	3.1
Borden	TX	0.0	0.1	0.1
Cochran	TX	1.2	1.7	1.8
Crosby	TX	2.3	3.3	3.5
Dawson	TX	4.7	6.1	6.7
Dickens	TX	0.4	0.6	0.7
Floyd	TX	2.3	3.3	3.7
Gaines	TX	2.4	4.0	4.7
Garza	TX	0.7	1.3	1.5
Hale	TX	6.9	12.7	15.1
Hockley	TX	3.5	6.3	7.7
Kent	TX	0.2	0.1	0.1
Lamb	TX	3.5	5.8	6.4
Lubbock	TX	24.2	41.4	48.7
Lynn	TX	2.1	3.3	3.5
Motley	TX	0.0	0.2	0.2
Scurry	TX	1.3	3.4	4.1
Terry	TX	3.0	5.0	5.6
Yoakum	TX	1.1	2.3	2.8
De Baca	NM	0.3	0.8	0.9
Roosevelt	NM	NA	NA	3.8
TOTAL		62.0	104.5	124.7

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Only 39% of the Hispanic persons within this ADI market live in the metro area. This is contrary to the national trend which shows Hispanics heavily concentrated in metropolitan areas.

2. Age/Sex Of The Population

In this very young market only 9.3% of the Hispanic population are adults over 49 years of age.

LUBBOCK
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	19.3		15.5%	
Males 35 - 49	8.5		6.8	
Males 50 - 64	3.8		3.0	
Males 65+	2.0		1.6	
Males 18+		**33.6**		**26.9%**
Females 18 - 34	19.0		15.2	
Females 35 - 49	8.7		7.0	
Females 50 - 64	3.9		3.1	
Females 65+	2.0		1.6	
Females 18+		**33.6**		**26.9**
Teens (12 - 17)	**18.6**		**15.0**	
Children (0 - 11)	**38.9**		**31.2**	
TOTAL	**124.7**		**100.0%**	

Source: Strategy Research Corporation

The Hispanic population of the Lubbock Market is evenly distributed between adult males and females.

3. Country Of Origin

With regard to country of origin of the Hispanic population, Lubbock, like all of Texas, is predominantly Mexican. Ninety-five percent of Lubbock area Hispanics are of Mexican descent.

4. Language Spoken At Home

Roughly one-half of the Hispanics in Lubbock speak Spanish at home, while another 45% speak both English and Spanish in their homes.

5. Spanish Media Availability

The Lubbock Hispanic Market is currently served by one radio station broadcasting Spanish language programming.

MARKET-24

TAMPA/ST. PETERSBURG

1. Population - 1985

The Tampa/St. Petersburg Market ranks 24th in the nation with an estimated Hispanic population of 122,700 in 1985. This represents almost a 20% increase in population from that recorded by the 1980 Census.

TAMPA/ST. PETERSBURG MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Citrus	FL	0.2	0.8	1.0
De Soto	FL	0.1	0.6	0.8
Hardee	FL	2.2	3.2	3.6
Hernando	FL	0.2	0.8	1.0
Highlands	FL	0.2	1.8	2.1
Hillsborough	FL	52.5	64.2	73.0
Manatee	FL	1.4	3.2	4.1
Pasco	FL	1.1	4.7	6.6
Pinellas	FL	5.2	10.5	13.6
Polk	FL	3.4	9.6	13.3
Sarasota	FL	1.9	3.0	3.6
TOTAL		68.4	102.4	122.7

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Pinellas County, with an estimated total population of 769,000 persons in 1985 will be Florida's third most populated county. Similarly, Hillsborough County is projected to have an overall population of 694,900 persons by 1985, making it Florida's fourth most populous county. The Latin population is highly concentrated in Hillsborough County (73,000 persons); the City of Tampa alone houses 56% of the county's total Hispanic population.

In fact, 76% of the Market's Hispanics live within the metropolitan area (Hillsborough, Pasco and Pinellas Counties).

2. Age/Sex Of The Population

One-third of the Tampa/St. Petersburg Market Hispanic population is under 18 years of age.

TAMPA/ST. PETERSBURG
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	17.5		14.3%	
Males 35 - 49	10.3		8.4	
Males 50 - 64	7.4		6.0	
Males 65+	4.0		3.3	
Males 18+		**39.2**		**32.0%**
Females 18 - 34	17.7		14.4	
Females 35 - 49	10.8		8.8	
Females 50 - 64	9.2		7.5	
Females 65+	5.0		4.1	
Females 18+		**42.7**		**34.8**
Teens (12 - 17)	**14.5**		**11.8**	
Children (0 - 11)	**26.3**		**21.4**	
TOTAL	**122.7**		**100.0%**	

Source: Strategy Research Corporation

Adult males constitute 32.0% of the Latin population base, while adult females make up 34.8% of the market area.

3. Country Of Origin

The Hispanic community of Tampa/St. Petersburg is predominantly of Cuban origin influenced by the massive immigration from Cuba since 1960 and the last group arriving from the Mariel boatlift in 1980. The greatest migratory period was from 1960 to 1979, which accounts for 69% of the total immigrants. The second most important migratory period was from 1930 to 1959, with 18% of the immigrants arriving during that era. The third group that arrived in 1980 accounts for 11% of the total immigration.

4. Language Spoken At Home

In the Tampa/St. Petersburg Market, as in the Miami Market, Hispanics prefer speaking Spanish in their homes. Eighty-one percent speak Spanish at home, while another twelve percent speak Spanish and English at home.

5. Spanish Media Availability

The Tampa Bay area is served by three radio stations with Spanish language programming. These are WAMA, WTYM and WYOU.

	Approximate Number Serving The Area
Spanish Language Radio Stations	3
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	1

The Tampa Market is covered by a low power television station, W50AC, which receives its signal from WLTV (Channel 23), the SIN affiliate in Miami.

6. Home Ownership

Approximately 86% of the Tampa/St. Petersburg Hispanics live in single family homes and most of them (72%) own their own homes.

MARKET-25

LAREDO

1. Population - 1985

The Laredo Market, located in the southern portion of the State of Texas, is comprised of Webb and Zapata Counties. Hispanics in these two counties represent more than 90% of the total ADI population.

LAREDO MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Webb	TX	53.8	90.8	106.9
Zapata	TX	3.7	5.0	6.2
TOTAL		57.5	95.8	113.1

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

2. Age/Sex Of The Population

With regard to the age/sex distribution of the population, approximately 40% of the Hispanics in this Texas market are under 18 years of age.

LAREDO
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	13.5		11.9%	
Males 35 - 49	7.3		6.5	
Males 50 - 64	6.2		5.5	
Males 65+	3.4		3.0	
Males 18+		**30.4**		**26.9%**
Females 18 - 34	14.9		13.2	
Females 35 - 49	9.0		7.9	
Females 50 - 64	8.9		7.8	
Females 65+	4.6		4.1	
Females 18+		**37.4**		**33.0**
Teens (12 - 17)	**13.8**		**12.2**	
Children (0 - 11)	**31.5**		**27.9**	
TOTAL	**113.1**		**100.0%**	

Source: Strategy Research Corporation

Adult males represent 27% of the population, while adult females comprise 33% of the Market's Hispanic population.

3. Country Of Origin

For the most part, Mexicans constitute the Hispanic population base within the Laredo ADI as they represent 95% of all Hispanics in the Market area.

4. Language Spoken At Home

Forty-five percent of Laredo Hispanics report that they speak Spanish in their homes. Meanwhile, another fifty-two percent speak both English and Spanish at home.

5. Spanish Media Availability

Laredo has three radio stations with Spanish language programming and has a daily newspaper in Spanish and English.

	Approximate Number Serving The Area
Spanish Language Radio Stations	3
Spanish Language Television Stations	1
Spanish Language Local Newspapers/Magazines	1

Spanish speaking residents of Laredo can view Spanish language programming on XEFE, a Mexican television station, or via a Spanish language Cable Television station.

MARKET-26

WASHINGTON D.C.

1. Population - 1985

The Washington, D.C. ADI is comprised of 38 counties which fall in portions of Maryland, Virginia, West Virginia and Pennsylvania. The Market contains a total of 111,300 Hispanic persons. The Hispanic population in this market has shown an increase of 63%, or over 43,000 Hispanic persons since 1970.

WASHINGTON D.C. MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
District of Columbia	DC	15.9	17.7	18.6
Allegany	MD	0.0	0.3	0.3
Calvert	MD	0.0	0.3	0.3
Charles	MD	0.0	0.9	1.1
Frederick	MD	0.4	0.8	1.0
Montgomery	MD	15.7	22.8	25.7
Prince George's	MD	14.5	14.4	15.0
St. Mary's	MD	0.8	0.8	0.9
Washington	MD	0.0	0.7	0.7
Alexandria	VA	0.0	4.0	4.3
Arlington	VA	6.3	8.9	10.2
Clarke	VA	0.0	*	0.1
Culpeper	VA	0.0	0.2	0.2
Fairfax City	VA	0.0	0.4	0.5
Fairfax	VA	11.8	19.5	22.9
Falls Church	VA	0.0	0.3	0.3
Fauquier	VA	0.0	0.1	0.3
Frederick	VA	0.0	0.1	0.1
Fredericksburg	VA	0.0	0.1	0.1
King George	VA	0.0	0.1	0.1
Loudoun	VA	0.5	0.8	1.1
Madison	VA	0.0	0.0	NA
Manassas City	VA	0.0	0.2	0.2
Manassas Park	VA	0.0	*	0.1
Page	VA	0.0	0.1	0.1
Prince William	VA	2.3	3.3	3.7
Rappahannock	VA	0.0	0.1	0.1
Shenandoah	VA	0.0	0.2	0.2
Spotsylvania	VA	0.0	0.3	0.4
Stafford	VA	0.0	0.5	0.6
Warren	VA	0.0	0.2	0.2
Westmoreland	VA	0.0	0.1	0.1
Winchester	VA	0.0	0.1	0.1
Franklin	PA	0.0	0.6	0.7
Fulton	PA	0.0	*	NA

Continued. . .

WASHINGTON D.C. MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985
(Continued)

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Berkeley	WV	0.0	0.3	0.4
Hampshire	WV	0.0	0.1	0.1
Hardy	WV	0.0	*	NA
Jefferson	WV	0.0	0.2	0.3
Mineral	WV	0.0	0.1	0.1
Morgan	WV	0.0	*	0.1
TOTAL		68.2	99.6	111.3

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce -
Bureau of the Census
Strategy Research Corporation

A total of 18,600 Hispanic persons reside in the District of Columbia, while over 48,000 Hispanic persons have residence in Montgomery County, Maryland and Fairfax County, Virginia.

2. Age/Sex Of The Population

Approximately 32.7% of the Hispanic population is under the age of 18, while 35.4% of the Hispanic population is between the ages of 18 and 34. These figures show that 75,800 of the 111,300 Hispanic persons in this ADI are under the age of 35.

WASHINGTON D.C.
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	19.4		17.4%	
Males 35 - 49	9.2		8.3	
Males 50 - 64	5.2		4.7	
Males 65+	2.7		2.4	
Males 18+		**36.5**		**32.8%**
Females 18 - 34	20.0		18.0	
Females 35 - 49	9.9		8.9	
Females 50 - 64	5.6		5.0	
Females 65+	2.9		2.6	
Females 18+		**38.4**		**34.5**
Teens (12 - 17)	**12.4**		**11.1**	
Children (0 - 11)	**24.0**		**21.6**	
TOTAL	**111.3**		**100.0%**	

Source: Strategy Research Corporation

Adult men represent 32.8% of the Hispanics compared with 34.5% for Hispanic adult women.

3. Country Of Origin

The Washington D.C. Hispanic Market is formed of diverse Hispanic groups. No one group severely dominates in this market. Roughly 16% are Mexican, 10% are Puerto Rican and 8% are Cuban.

4. Spanish Media Availability

The Washington D.C. area is served by three radio stations broadcasting Spanish language programming.

	Approximate Number Serving The Area
Spanish Language Radio Stations	3
Spanish Language Television Stations	1

The area is also covered by a low power television station, W14AA.

MARKET-27

ODESSA/MIDLAND

1. Population - 1985

The 27th largest market with regard to Hispanic population is Odessa/Midland, Texas in which reside 106,600 persons of Hispanic origin. This figure represents an increase in the number of Hispanic persons in the area of 116% from the 1970 total figure of 49,300. Roughly 27% of the residents of this Market are Hispanics.

ODESSA/MIDLAND MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Lea South	NM	0.7	1.2	2.0
Andrews	TX	0.5	2.9	4.0
Brewster	TX	3.3	3.3	3.5
Crane	TX	0.3	1.2	1.3
Crockett	TX	1.1	2.1	2.5
Culberson	TX	1.5	2.1	NA
Ector	TX	9.7	24.8	32.0
Glasscock	TX	0.3	0.4	0.4
Howard	TX	4.7	7.0	7.6
Jeff Davis	TX	0.7	0.8	1.0
Loving	TX	0.1	*	*
Martin	TX	1.4	1.6	1.9
Midland	TX	5.1	12.3	15.9
Pecos	TX	4.1	7.1	8.4
Presidio	TX	3.2	4.0	4.4
Reagan	TX	0.4	1.3	1.6
Reeves	TX	7.2	9.8	10.7
Terrell	TX	0.7	0.7	0.7
Upton	TX	0.8	1.3	1.4
Ward	TX	2.5	3.8	4.3
Winkler	TX	1.0	2.6	3.0
TOTAL		49.3	90.3	106.6

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Approximately 45%, or 47,900 of the Hispanic population of this Market reside in Ector and Midland Counties. Thirty-two thousand Hispanics make Ector County their home, while 15,900 live in Midland County. The Hispanic population of Ector County has more than tripled since 1970.

2. Age/Sex Of The Population

Adult women make up 28.8% of the Hispanic population, while adult men are 28.5%.

ODESSA/MIDLAND
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	16.5		15.5%	
Males 35 - 49	7.4		6.9	
Males 50 - 64	4.2		3.9	
Males 65+	2.3		2.2	
Males 18+		**30.4**		**28.5%**
Females 18 - 34	16.1		15.1	
Females 35 - 49	7.7		7.2	
Females 50 - 64	4.5		4.2	
Females 65+	2.5		2.3	
Females 18+		**30.8**		**28.8**
Teens (12 - 17)	**14.3**		**13.5**	
Children (0 - 11)	**31.1**		**29.2**	
TOTAL	**106.6**		**100.0%**	

Source: Strategy Research Corporation

The Hispanic population of the Odessa/Midland area can be considered quite young; 73.3% are under the age of 35, while about 42.7% are 17 years of age or younger. Children under the age of 12 represent 29.2% of the Hispanic population.

3. Country Of Origin

Approximately 96% of the Hispanics in the Odessa/Midland Market are of Mexican descent.

4. Spanish Media Availability

The Odessa/Midland Hispanic community is served by two radio stations with Spanish language programming.

MARKET-28

COLORADO SPRINGS/PUEBLO

1. Population - 1985

The Colorado Springs/Pueblo, Colorado Market is over 16% Hispanic, with a population of 95,500 Hispanics.

From 1970 to 1985, the Hispanic population of the Market increased by 52% with an addition of 32,500 Hispanic persons.

COLORADO SPRINGS/PUEBLO MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Baca	CO	0.2	0.3	0.4
Bent	CO	0.9	1.5	1.6
Cheyenne	CO	0.5	0.1	0.1
Crowley	CO	0.5	0.6	0.6
Custer	CO	0.0	0.0	*
El Paso	CO	13.3	25.0	27.6
Fremont	CO	1.3	2.3	2.5
Hinsdale	CO	*	*	NA
Huerfano	CO	2.6	2.8	2.9
Kiowa	CO	*	0.0	0.0
Las Animas	CO	5.9	6.5	6.7
Lincoln	CO	*	0.0	NA
Mineral	CO	0.0	0.0	NA
Otero	CO	6.3	7.5	7.6
Prowers	CO	1.8	2.6	NA
Pueblo	CO	29.7	41.6	43.9
Saguache	CO	NA	NA	1.6
Teller	CO	*	0.1	NA
TOTAL		63.0	90.9	95.5

NA = Not Applicable

* Designates a Hispanic population of less than 100 persons.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

With regard to density, roughly 75% or 71,500 of the Hispanic residents of this Market are located in the adjoining counties of El Paso and Pueblo. The former accounts for 27,600 Hispanics and the latter for 43,900 Hispanics.

2. Age/Sex Of The Population

Adult men comprise 30.7% of this Market's Hispanics, while adult women constitute 28.9%.

COLORADO SPRINGS/PUEBLO
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	15.9		16.5%	
Males 35 - 49	7.0		7.3	
Males 50 - 64	4.2		4.4	
Males 65+	2.2		2.3	
Males 18+		**29.3**		**30.7%**
Females 18 - 34	13.4		14.0	
Females 35 - 49	7.3		7.7	
Females 50 - 64	4.5		4.7	
Females 65+	2.4		2.5	
Females 18+		**27.6**		**28.9**
Teens (12 - 17)	**13.7**		**14.3**	
Children (0 - 11)	**24.9**		**26.1**	
TOTAL	**95.5**		**100.0%**	

Source: Strategy Research Corporation

Typical of the U.S. Hispanic market, the Colorado Springs/Pueblo Hispanic community is very young. Approximately 71% are under 35 years of age, while children and teenagers account for 40.4% of the population.

3. Country Of Origin

The Colorado Springs/Pueblo area Hispanics are predominantly of Mexican descent (61%).

4. Spanish Media Availability

The Colorado Springs/Pueblo area has four radio stations serving the Hispanic community with Spanish language programming.

MARKET-29

EL CENTRO/YUMA

1. Population - 1985

The El Centro/Yuma ADI is comprised of two counties: Yuma, Arizona and Imperial, California.

The 1985 estimated Hispanic population for this Market is 92,800 persons, an increase of 19% over 1980's Hispanic total.

EL CENTRO/YUMA MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Yuma	AZ	10.6	26.6	30.3
Imperial	CA	25.3	51.4	62.5
TOTAL		35.9	78.0	92.8

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The City of El Centro, located in Imperial County, has a population base of more than 50% Hispanics.

2. Age/Sex Of The Population

The Market is a "young" market with 44.6% of the population under 18 years of age and 72.5% under 35 years of age.

EL CENTRO/YUMA
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	12.8		13.8%	
Males 35 - 49	6.4		6.9	
Males 50 - 64	3.7		4.0	
Males 65+	2.0		2.2	
Males 18+		**24.9**		**26.8%**
Females 18 - 34	13.1		14.1	
Females 35 - 49	7.5		8.1	
Females 50 - 64	3.8		4.1	
Females 65+	2.1		2.3	
Females 18+		**26.5**		**28.6**
Teens (12 - 17)	**13.1**		**14.1**	
Children (0 - 11)	**28.3**		**30.5**	
TOTAL	**92.8**		**100.0%**	

Source: Strategy Research Corporation

The Hispanic adult male/female ratio is relatively even, with 26.8% of the population consisting of males and 28.6% consisting of females.

3. Country Of Origin

In the El Centro/Yuma Market, 93% of the Hispanics are of Mexican descent.

4. Spanish Media Availability

The El Centro/Yuma area is served by four radio stations with Spanish language programming.

	Approximate Number Serving The Area
Spanish Language Radio Stations	4
Spanish Language Television Stations	1

The Spanish television audience in this Market can view Spanish language programming on XHBC, a Mexican television station.

MARKET-30

BAKERSFIELD

1. Population - 1985

In 1985, the Bakersfield, California Market will be the home for approximately 91,500 Hispanics.

BAKERSFIELD MARKET (ADI)
HISPANIC POPULATION
1970, 1980, 1985

County	State	1970 Hispanic Population (000)	1980 Hispanic Population (000)	1985 Hispanic Population (000)
Kern West	CA	49.8	87.0	91.5
TOTAL		49.8	87.0	91.5

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The Hispanic population has grown by over 5% since 1980 and almost doubled since 1970.

2. Age/Sex Of The Population

Adults over the age of 49 comprise only 13.2% of this young Hispanic market.

BAKERSFIELD
HISPANIC AGE/SEX DISTRIBUTION
1985

	1985 Hispanic Population (000)		Percent Distribution	
Males 18 - 34	13.4		14.6%	
Males 35 - 49	6.5		7.1	
Males 50 - 64	4.2		4.6	
Males 65+	2.1		2.3	
Males 18+		**26.2**		**28.6%**
Females 18 - 34	13.3		14.5	
Females 35 - 49	6.4		7.0	
Females 50 - 64	3.8		4.2	
Females 65+	1.9		2.1	
Females 18+		**25.4**		**27.8**
Teens (12 - 17)	**13.3**		**14.5**	
Children (0 - 11)	**26.6**		**29.1**	
TOTAL	**91.5**		**100.0%**	

Source: Strategy Research Corporation

Approximately 73% of all Hispanics residing in the Bakersfield Market are under 35 years of age, with 44% under the age of 18.

3. Country Of Origin

Typical of other southwestern markets, the Bakersfield Market is comprised mostly of Mexican-Americans. That is, at least nine out of every ten Hispanics in this California market is of Mexican origin.

4. Language Spoken At Home

In Bakersfield, 57% of the Hispanics report that they speak Spanish in their homes.

5. Spanish Media Availability

Bakersfield is served by one local radio station with Spanish language programming and by a low power television station, K38AB which receives its signal from KFTV, the SIN affiliate in Fresno.

B. UNITED STATES/MEXICO BORDER MARKETS

The major U.S. Hispanic markets along the Mexican border (El Centro/Yuma, El Paso, Laredo, McAllen/Brownsville and San Diego) are situated adjacent to "sister cities" on the Mexican side. That is, both the U.S. and Mexican markets are within close proximity to one another and travel between the two cities is constant.

HISPANIC POPULATION U.S./MEXICO BORDER MARKETS

Market	Number Of Hispanic Persons	
El Centro/Yuma ADI	92,800	
Mexicali, Mexico	374,200	
El Centro/Yuma/Mexicali		467,000
El Paso ADI	419,200	
Ciudad Juarez, Mexico	667,300	
El Paso/Ciudad Juarez		1,086,500
Laredo ADI	113,100	
Nuevo Laredo, Mexico	253,700	
Laredo/Nuevo Laredo		366,800
McAllen/Brownsville ADI	537,800	
Matamoros, Mexico	215,200	
McAllen/Brownsville/Matamoros		753,000
San Diego ADI	340,100	
Tijuana, Mexico	821,300	
San Diego/Tijuana		1,161,400

Source: Mexican Government Census Bureau
Strategy Research Corporation

In total, the five U.S. Hispanic ADIs lie adjacent to Mexican cities that represent a population of 2.3 million persons. Many of these border market Mexicans frequently cross the U.S./Mexican border in order to shop in U.S. retail outlets. For example, Ciudad Juarez borders directly on El Paso's central business district. Approximately one-third of all dollars spent in El Paso's downtown retail outlets comes from these border market consumers.

In viewing the U.S. metro market rankings, the extent to which Mexican citizens shopping on the U.S. side of the border is apparent.

Laredo ranks 314th among all U.S. metro markets for total Effective Buying Income (EBI) and 253rd for total Retail Sales, yet, it ranks second among the U.S. markets with regard to total Retail Sales Per Household.

The metro market of McAllen/Edinburg/Mission ranks 193rd in total Effective Buying Income and 90th for the Per Household Retail Sales.

METRO AREA RANKINGS
U.S. METRO AREAS ONLY

	Brownsville/ Harlingen SMSA	El Paso SMSA	Laredo SMSA	McAllen/ Edinburg/ Mission SMSA
Population	169	89	281	129
Households	195	99	309	163
Effective Buying Income (EBI)	212	108	314	193
Average Household EBI	277	238	308	313
Total Retail Sales	194	99	253	154
Per Household Retail Sales	145	118	2	90
Food Store Sales	173	94	257	135
Drugstore Sales	278	88	275	194
General Merchandise Store Sales	168	94	212	126
Apparel & Accesories Store Sales	160	84	145	86
Furniture & Home Furnishings Store Sales	168	66	248	148
Automotive Dealer Sales	229	86	301	173
Gasoline Service Station Sales	250	103	252	204

Source: Survey of Buying Power Data Service

Although the exact number of dollars expended on each side of the border is somewhat difficult to determine, the fact remains that Mexican consumers are easily reached through U.S. advertising as many are bilingual and subscribe to U.S. publications. Newspaper and radio are the most efficient and cost effective means of reaching Mexicans along the border. Furthermore, the constant border traffic reinforces ties with the homeland for Hispanic residents on the U.S. side, thereby helping to stimulate consumption of Spanish media. In sum, Mexicans living on the border are a viable market for advertisers.

The following table illustrates the impact of the additional Mexican citizen population in the U.S./Mexican border markets.

Three of the five border markets now rank in the top ten ADI rankings.

TOP 30 HISPANIC MARKETS
(INCLUDING U.S./MEXICO BORDER MARKETS)

Rank	Market	Hispanic Population (000)
1	Los Angeles ADI	3,353.7
2	New York ADI	2,442.3
3	San Diego ADI/Tiajuana, Mexico	1,161.4
4	El Paso ADI/Ciudad Juarez	1,086.5
5	Miami ADI	863.5
6	San Antonio ADI	781.8
7	McAllen/Brownsville ADI/Matamoros, Mexico	753.0
8	Chicago ADI	741.4
9	San Francisco ADI	717.2
10	Houston ADI	611.3
11	El Centro/Yuma ADI/Mexicali, Mexico	467.0
12	Albuquerque ADI	422.2
13	Fresno ADI	369.1
14	Laredo ADI/Nuevo Laredo, Mexico	366.8
15	Dallas/Ft. Worth ADI	324.6
16	Phoenix ADI	317.6
17	Sacramento ADI	307.3
18	Corpus Christi ADI	283.1
19	Denver ADI	253.7
20	Philadelphia ADI	225.0
21	Tucson ADI	191.7
22	Salinas/Monterey ADI	141.2
23	Austin ADI	138.0
24	Boston ADI	131.2
25	Lubbock ADI	124.7
26	Tampa/St. Petersburg ADI	122.7
27	Washington D.C. ADI	111.3
28	Odessa/Midland ADI	106.6
29	Colorado Springs/Pueblo ADI	95.5
30	Bakersfield ADI	91.5

Source: Mexican Government Census Bureau
Strategy Research Corporation

VIII. PUERTO RICO

VIII. PUERTO RICO

Puerto Rico is a Commonwealth of the United States. The Island's population in 1985 is estimated at 3.4 million persons who are U.S. citizens. The Island is much like the U.S. mainland in terms of marketing. For many years, Puerto Ricans have left the Island to seek opportunity in the United States. Many return, bringing with them their stateside-acquired purchase habits.

In addition to those who return permanently to the Island, there is another group of Puerto Ricans familiar with U.S. products. Large numbers of Puerto Ricans travel to the U.S. for short periods of time: to visit family, to vacation, to study or to join the Armed Forces.

This back-and-forth travel means consumers are exposed to new products, new ideas, and new ways of doing things. When they return to Puerto Rico, they import their preferences with them. By the same token, Puerto Ricans also export their preferences to the mainland.

1. Population

The estimated population of the Island of Puerto Rico in 1985 is 3,388,200 persons. This reflects a gain of 192 thousand over the 1980 Census figure of 3,196,520, or a percentage gain of 6.0%. During the same 1980 to 1985 time span, the total United States population increased by about 5.1%.

TOTAL POPULATION
PUERTO RICO AND UNITED STATES
1970, 1980, 1985

	Population 1970	Population 1980	Population 1985	Percent Change 1970-1980	Percent Change 1980-1985
Puerto Rico	2,712,100	3,196,520	3,388,200	17.6%	6.0%
United States	203,211,926	226,545,805	238,100,000	11.5	5.1

Source: U.S. Department of Commerce
Bureau of the Census.
Strategy Research Corporation

2. Age/Sex Distribution

Median age for Puerto Rico residents in 1980 was 24.6 years, up three years from 1970's median age of 21.6 years. In contrast, the median age of the total U.S. population was 30.0 years, and that of U.S. Hispanics 23.2 years. Children under the age of twelve accounted for a full one-quarter of the population (25.2%) in 1980, followed by women 18 to 34 (14.2%) and teens aged 12 to 17 (13.0%). Adult females (age 18 and up) continued to outnumber adult males (32.5 and 29.3%, respectively). The following table provides a fuller breakdown of the 1980 age/sex distribution in Puerto Rico.

PUERTO RICO
AGE/SEX DISTRIBUTION
1980

	Percent Distribution	
Males 18 - 34	12.8%	
Males 35 - 49	7.4	
Males 50 - 64	5.3	
Males 65+	3.8	
Males 18+		**29.3%**
Females 18 - 34	14.2	
Females 35 - 49	8.4	
Females 50 - 64	5.8	
Females 65+	4.1	
Females 18+		**32.5**
Teens 12 - 17	**13.0**	
Children 0 - 11	**25.2**	
TOTAL	100.0%	
Median Age	**24.6**	

Source: U.S. Department Of Commerce
Bureau of the Census

IX. PRODUCT USAGE

IX. PRODUCT USAGE

The Hispanic family spends almost one-fourth more of its income in grocery stores than does the non-Hispanic family. Thus, a substantial part of their disposable income will be spent on grocery items. Furthermore, the average Hispanic family also consumes more than the non-Hispanic family for packaged goods. The majority of Hispanic consumer purchases are in the areas of food, beverage and clothing. Hispanic consumers are an excellent target audience for marketers since they spend a disproportionately high percentage of their income on packaged goods.

As a consumer group, Hispanics are very brand conscious. Brand awareness, brand loyalty and appreciation of quality products are important factors in the Hispanic's purchasing decisions. Brand identity and loyalty are traced, in part, to the Hispanic's need to identify with recognized brands and associated product quality that signify "the best" is being provided to their family. It also reduces the anxiety of making a wrong decision and wasting money, particularly where language comprehension may be a problem.

Given the importance of the family in Hispanic culture, it should not be surprising to find that the Hispanic places product reputation and quality ahead of price.

When first arriving in the U.S., many new immigrants do not recognize "familiar" products and thus have to adjust to new brand selection. When an acceptable brand is found, shoppers usually stay with this brand as their "original" brand for several years. Thus, loyalty is high among new arrivals.

Most Hispanic food store shopping is done in major supermarkets. Many of the major supermarket chains maintain outlets in Hispanic areas and actively cater to the Hispanic trade. However, while most Hispanic shoppers do use major supermarkets as their primary food stores, "bodegas" (small neighborhood grocery stores) serve as secondary stores and are quite important in distribution. Additional small neighborhood stores, such as Hispanic butcher shops and bakeries, supplement the primary stores.

Hispanic shopping patterns are conditioned by the need for feeling culturally welcome, by the store personnel and by the products offered. The buying habits of the Hispanic in terms of brand preference are substantially influenced by the importance that the advertiser places on addressing the Hispanic.

The following is data pertaining to the incidence of usage for a wide array of products among Hispanic and non-Hispanic consumers.

A. HISPANIC AND NON-HISPANIC HOUSEHOLD USAGE

Usage incidences for a wide array of products is presented by total market for Hispanic and non-Hispanic product usage. In order to further analyze the data, a Hispanic to non-Hispanic usage index is shown. An index of 100 indicates that Hispanic percent incidence and non-Hispanic percent incidence were identical. An index above 100 indicates that incidence among Hispanic households was higher than non-Hispanic households.

The following is Hispanic and non-Hispanic product usage data for "Food and Beverage Items," "Health and Beauty Aids," and "Cleaners and Paper Goods."

1. Food and Beverage Items

Many food and beverage products were found to index higher for the U.S. Hispanic population. These products include Baby Food-Jar, Beans-Canned, Chewing Gum, Coffee-Ground-Latin Style, Drinks-Orange Flavor-Breakfast, Fruit Nectars, Gelatin/Pudding Powdered, Malt Liquor, Mayonnaise, Olive Oil, Potato/Corn Chips, Rice-Regular, Soft Drinks-Regular, Spaghetti-Canned, Spaghetti-Sauce, Tomato Sauce-Canned, Vegetable Juice-Mixed and Yogurt.

Among the "Food and Beverage Items" surveyed, the products receiving the highest indices for Hispanics were Baby Food-Jar, Coffee-Ground-Latin Style, Fruit Nectars and Malt Liquors.

1984
INCIDENCE OF USE
HISPANIC AND NON-HISPANIC HOUSEHOLDS
FOOD AND BEVERAGE ITEMS
USE INDEX

	TOTAL HISPANICS	TOTAL NON-HISPANICS	USE INDEX HISPANIC TO NON-HISPANIC
Baby Food - Jar	25.1%	6.9%	363.8
Beans - Canned - Water & Salt	42.3	40.0	105.8
Beans - Canned - Ready to Eat	52.0	27.0	192.6
Beer	59.0	54.0	109.3
Cheese - Sliced - Processed	75.2	91.2	82.5
Chewing Gum	70.0	59.0	118.6
Coffee - Ground - American Style	48.7	64.5	75.5
Coffee - Ground - Latin Style	52.2	5.8	900.0
Drinks - Fruit Type	79.4	48.7	163.0
Drinks - Children's Powdered	37.9	42.0	90.2
Drinks - Orange Flavor - Breakfast	49.6	30.0	165.3
Dog Food	21.1	38.4	54.9
Frozen Dinners	27.2	28.5	95.4
Fruit - Canned	77.8	79.5	97.9
Fruit Juice - Frozen	57.4	73.1	78.5
Fruit Nectars	65.5	17.4	376.4
Gelatin/Pudding Powdered	77.0	74.9	102.8
Lunch Meats - Canned	32.6	37.7	86.5
Lunch Meats - Packaged	51.4	61.8	83.2
Malt Liquor	13.3	4.7	283.0
Margarine	81.5	86.8	93.9
Mayonnaise	91.4	91.2	100.2
Oil - Liquid Cooking & Salad	90.9	92.4	98.4
Olive Oil	69.2	45.4	152.4
Potato/Corn Chips	74.2	70.6	105.1
Rice - Regular	97.7	86.1	113.5
Salad Dressing - Prepared	59.6	75.4	79.0
Salad Dressing - Dry Mix	37.3	51.8	72.0
Shortening	48.5	72.9	66.5
Soft Drink - Diet	35.5	46.8	75.9
Soft Drink - Regular	88.3	67.8	130.2
Spaghetti - Dry	85.3	86.1	99.1

Continued. . .

1984
INCIDENCE OF USE
HISPANIC AND NON-HISPANIC HOUSEHOLDS
FOOD AND BEVERAGE ITEMS
USE INDEX
(Continued)

	TOTAL HISPANICS	TOTAL NON-HISPANICS	USE INDEX HISPANIC TO NON-HISPANIC
Spaghetti - Canned	34.0%	19.1%	178.0
Spaghetti - Sauce	48.5	43.3	112.0
Tea	70.6	89.7	78.7
Tomato Juice	50.4	57.6	87.5
Tomato Paste - Canned	54.8	64.1	85.5
Tomato Sauce - Canned	88.3	81.9	107.8
Tuna - Canned	88.3	91.5	96.5
Vegetables - Canned	64.5	77.8	82.9
Vegetables - Frozen	52.5	81.1	64.7
Vegetable Juice - Mixed	50.4	43.1	116.9
Yogurt	60.4	43.0	140.5

Source: Strategy Research Corporation

2. Health and Beauty Aids

Hispanic households demonstrated a higher product usage index for the majority of Health and Beauty Aid products surveyed. The products registering the highest index for Hispanic households were Arthritis Remedies, Cold Remedies, Cough Syrup, Cream Rinse/Conditioner, Disposable Baby Diapers, Hair Coloring and Laxatives.

1984
INCIDENCE OF USE
HISPANIC AND NON-HISPANIC HOUSEHOLDS
HEALTH AND BEAUTY AIDS
USE INDEX

	TOTAL HISPANICS	TOTAL NON-HISPANICS	USE INDEX HISPANICS TO NON-HISPANICS
After Shave Lotion (Males)	76.2%	61.9%	123.1
Arthritis Remedies	34.5	23.7	145.6
Bath/Bar Soap	99.7	99.4	100.3
Cold Remedies - Tablets	80.5	48.0	167.7
Cold Remedies - Liquid	72.8	40.2	181.1
Cough Syrup	75.9	52.3	145.1
Cream Rinse/Conditioner	77.2	50.1	154.1
Deodorant	96.4	91.2	105.7
Disposable Baby Diapers	25.9	14.7	176.2
Eye Makeup (Females)	71.8	63.5	113.1
Facial Tissues	83.8	92.3	90.8
Hair Coloring (Females)	40.2	28.6	140.6
Hairspray (Females)	45.2	56.2	80.4
Hand Lotion	85.3	76.8	111.1
Headache Remedies	87.2	87.1	100.1
Indigestion/Upset Stomach Remedies	79.9	68.9	116.0
Laxatives	45.9	33.0	139.1
Lipstick (Females)	85.3	79.5	107.3
Mouthwash	72.8	75.8	96.0
Ointments/Rubs	63.6	54.4	116.9
Pantyhose (Females)	81.3	67.8	119.9
Perfumes/Toilet Water (Females)	91.8	92.0	99.8
Shampoo	97.9	92.9	105.4
Shaving Cream (Males)	70.9	62.3	113.8
Sunburn Products	32.6	55.3	58.9
Suntan Lotion	34.1	52.5	64.9
Toothpaste	99.7	96.2	103.6
Vitamins	59.7	64.9	92.0

Source: Strategy Research Corporation

3. Cleaner and Paper Goods

Dishwashing Liquid, Insecticides-House and Garden, Oven Cleaners and Pine Oil Disinfectants register the highest usage for Hispanic households.

1984
INCIDENCE OF USE
HISPANIC AND NON-HISPANIC HOUSEHOLDS
CLEANERS AND PAPER GOODS
USE INDEX

	TOTAL HISPANICS	TOTAL NON-HISPANICS	USE INDEX HISPANICS TO NON-HISPANICS
Air Fresheners/Room Deodorizers	64.4%	67.5%	95.4
Bleach	90.3	92.3	97.8
Cleaners - Liquid Household	80.8	91.3	88.5
Cleaners - Powdered Household	88.1	97.8	90.1
Detergent - Hand	40.8	78.3	52.1
Detergent - Laundry	96.7	98.9	97.8
Dishwashing Liquid	94.9	73.6	128.9
Detergent - Dishwasher	17.0	98.7	17.2
Drain Openers	45.2	54.5	82.9
Fabric Softeners	79.0	92.3	85.6
Floor Wax	33.8	43.9	76.9
Insecticides - House & Garden	80.5	67.1	120.0
Oven Cleaners	68.4	65.7	104.1
Paper Towels	95.6	96.2	99.4
Pine Oil Disinfectants	92.3	56.9	162.2
Plastic Bags	81.3	98.8	82.3
Toilet Bowl Cleaners	67.7	95.3	71.0
Window Cleaners	85.6	95.2	89.9

Source: Strategy Research Corporation

B. HISPANIC HOUSEHOLD USAGE

The following is data pertaining to the incidence of usage for a wide array of products among Hispanics, analyzed by market area and by country of origin.

1. Hispanic Household Usage By Market Area

The following presents data on Hispanic usage for "Food and Beverage Items," "Health and Beauty Aids," and "Cleaners and Paper Goods" by market area.

a. Food and Beverage

Several Food and Beverage products register over 90% incidence of use among Hispanics. For example, Rice-Regular registers a total incidence of use of 97.7% with a 100.0% incidence among Hispanic consumers in New York.

Mayonnaise, as well as Oil-Liquid Cooking and Salad are also household products with high overall levels of use (91.4% and 90.9%, respectively).

Beans-Canned-Water & Salt are used most by Hispanic consumers in the New York market area (78.2% incidence) and least often by consumers in California (13.9%).

Usage of Coffee-Ground-American Style and Coffee-Ground-Latin Style also differs among markets. Specifically, usage of Coffee-Ground-American Style is lowest in New York and Florida; however, these two markets register the highest levels of usage for Coffee-Ground-Latin Style.

The use of Fruit Juice-Frozen, Chewing Gum, Shortening, Baby Food-Jar, Drinks-Orange Flavor-Breakfast and Tomato Paste-Canned all register substantially lower incidences of use among Florida consumers than in other markets.

In the California market, Hispanics tend to use Beans-Canned-Water & Salt, Beans-Canned Ready to Eat and Spaghetti-Canned much less than in the other U.S. Hispanic areas.

1984
INCIDENCE OF USE
HISPANIC HOUSEHOLDS
FOOD AND BEVERAGE ITEMS
BY MARKET AREA

	Total	New York	Florida	California	Texas/ South-West
Baby Food - Jar	25.1%	35.6%	19.6%	24.3%	18.6%
Beans - Canned - Water & Salt	42.3	78.2	35.1	13.9	47.1
Beans - Canned - Ready to Eat	52.0	67.3	51.5	38.3	52.9
Beer	59.0	63.4	62.9	53.0	57.1
Cheese - Sliced - Processed	75.2	77.2	69.1	74.8	81.4
Chewing Gum	70.0	69.3	43.3	83.5	85.7
Coffee - Ground - American	48.7	27.7	34.0	60.9	70.0
Coffee - Ground - Latin Style	52.2	86.1	82.5	20.0	14.3
Drinks - Fruit Type	79.4	90.1	70.1	78.3	78.6
Drinks - Children Powdered	37.9	42.6	27.8	35.7	48.6
Drinks - Orange Flavor - Breakfast	49.6	58.4	25.8	59.1	54.3
Dog Food	21.1	22.8	19.6	18.3	25.7
Frozen Dinners	27.2	23.8	24.7	33.0	25.7
Fruit Canned	77.8	76.2	79.4	72.7	85.4
Fruit Juice - Frozen	57.4	71.3	37.1	62.6	57.1
Fruit Nectars	65.5	78.2	78.4	52.2	51.4
Gelatin/Pudding Powdered	77.0	79.2	85.6	70.4	72.9
Lunch Meats - Canned	32.6	22.8	24.7	38.3	48.6
Lunch Meats - Packaged	51.4	51.5	35.1	57.4	64.3
Malt Liquor	13.3	23.8	10.3	7.8	11.4
Margarine	81.5	73.3	86.6	79.1	90.0
Mayonnaise	91.4	92.1	82.5	95.7	95.7
Oil - Liquid Cooking & Salad	90.9	99.0	94.8	82.6	87.1
Olive Oil	69.2	76.2	90.7	54.8	52.9
Potato/Corn Chips	74.2	70.3	56.7	85.2	85.7
Rice - Regular	97.7	100.0	95.9	96.5	98.6
Salad Dressing - Prepared	59.6	50.0	43.7	71.1	77.1
Salad Dressing - Dry Mix	37.3	34.7	38.1	44.3	28.6
Shortening	48.5	47.0	17.5	56.2	82.9
Soft Drink - Diet	35.5	46.0	28.2	35.5	31.4
Soft Drink - Regular	88.3	88.0	86.4	88.4	91.4
Spaghetti - Dry	85.3	87.0	75.7	92.6	84.3

Continued. . .

1984
INCIDENCE OF USE
HISPANIC HOUSEHOLDS
FOOD AND BEVERAGE ITEMS
BY MARKET AREA
(continued)

	Total	New York	Florida	California	Texas/ South-West
Spaghetti - Canned	34.0%	55.0%	32.0%	30.7%	30.0%
Spaghetti - Sauce	48.5	58.0	53.4	44.4	48.6
Tea	70.6	89.0	62.1	66.1	64.3
Tomato Juice	50.4	52.5	39.2	53.0	58.6
Tomato Paste - Canned	54.8	73.0	31.1	64.5	47.1
Tomato Sauce - Canned	88.3	88.0	91.3	84.3	91.4
Tuna - Canned	88.3	94.0	83.5	87.6	88.6
Vegetables - Canned	64.5	72.0	60.2	54.5	77.1
Vegetables Frozen	52.5	70.0	42.7	47.1	51.4
Vegetable Juice - Mixed	50.4	47.5	42.3	53.9	60.0
Yogurt	60.4	61.0	65.0	60.3	52.9

Source: Strategy Research Corporation

b. Health and Beauty Aids

Among the Health and Beauty Aids products surveyed, Bath/Bar Soap, Toothpaste, Shampoo and Deodorants had the highest incidence of use among Hispanics overall. On the other hand, however, Disposable Baby Diapers and Hairspray are products least likely to be found in a Hispanic home.

Cold Remedies, in both Tablet and Liquid form, register the lowest incidence of use among Hispanics in the Florida market. Whereas these two Cold Remedies register incidences of use of 57.3% (tablets) and 42.7% (liquid) in this southern Hispanic market, the least level of incidence for either of these two products recorded by any of the other major markets is 82.0%. Likewise, Florida records the lowest use of Cough Syrup (51.5%) compared to the New York (83.0%), California (86.8%) and Texas/Southwest (82.9%) markets.

Hispanic consumers in Florida also register a somewhat lower incidence of use for Suntan Lotion and Sunburn Products.

The lowest incidence of use of Hairspray was recorded in Texas/Southwest where only 39.3% of the Hispanic females surveyed cited usage of this hair care product.

1984
INCIDENCE OF USE HISPANIC HOUSEHOLDS HEALTH AND BEAUTY AIDS BY MARKET AREA

	Total	New York	Florida	California	Texas/ South-West
After Shave Lotion (Males)	76.2%	64.7%	85.7%	54.2%	95.7%
Arthritis Remedies	34.5	30.0	32.0	33.1	47.1
Bath/Bar Soap	99.7	100.0	99.0	100.0	100.0
Cold Remedies - Tablets	80.5	87.0	57.3	90.1	88.6
Cold Remedies - Liquid	72.8	82.0	42.7	84.3	84.3
Cough Syrup	75.9	83.0	51.5	86.8	82.9
Cream Rinse/Conditioner	77.2	89.0	72.8	77.7	65.7
Deodorant	96.4	97.0	95.1	95.9	98.6
Disposable Baby Diapers	25.9	38.0	12.6	30.6	20.0
Eye Makeup (Females)	71.8	85.5	66.3	73.2	86.7
Facial Tissues	83.8	75.0	78.2	89.1	95.7
Hair Coloring (Females)	40.2	43.4	50.6	29.9	36.7
Hairspray (Females)	45.2	42.6	55.2	43.7	39.3
Hand Lotion	85.3	88.0	70.9	90.1	94.3
Headache Remedies	87.2	85.4	89.5	91.5	88.4
Indigestion/Upset Stomach Remedies	79.9	63.0	84.5	86.8	85.7
Laxatives	45.9	36.0	39.8	48.8	64.3
Lipstick (Females)	85.3	86.7	94.4	78.4	81.7
Mouthwash	72.8	74.0	67.3	73.9	77.1
Ointments/Rubs	63.6	68.0	47.5	64.7	78.6
Pantyhose (Females)	81.3	82.9	88.8	81.7	77.4
Perfumes/Toilet Water (Females)	91.8	93.9	93.8	94.6	84.9
Shampoo	97.9	100.0	95.0	98.3	98.6
Shaving Cream (Males)	70.9	72.2	52.4	80.8	76.5
Sunburn Products	32.6	54.0	13.9	29.4	34.3
Suntan Lotion	34.1	52.0	21.8	31.1	31.4
Toothpaste	99.7	100.0	100.0	99.2	100.0
Vitamins	59.7	72.0	45.5	68.1	48.6

Source: Strategy Research Corporation

c. Cleaners And Paper Goods

Cleaners and Paper Goods such as Bleach, Laundry Detergent, Dishwashing Liquid, Paper Towels and Pine Oil Disinfectants are extremely popular among Hispanics.

In Florida, the use of Pine Oil Disinfectants, Powdered Household Cleaners, Drain Openers, Floor Wax and Paper Towels are extremely prevalent in Hispanic households.

Standout items in terms of relative use by Hispanic households in New York include Bleach, Liquid Household Cleaners, Fabric Softeners and Window Cleaners.

In California, the use of Bleach and both Household Cleaners-Liquid and Powdered, register high levels of usage among the markets surveyed, whereas in the Texas/Southwest region, House and Garden Insecticides registered a higher incidence of household use than in the other major Hispanic markets.

1984
INCIDENCE OF USE
HISPANIC HOUSEHOLDS
CLEANERS AND PAPER GOODS
BY MARKET AREA

	Total	New York	Florida	California	Texas/ South-West
Air Fresheners/Room Deodorizers	64.4%	62.0%	64.4%	67.2%	62.9%
Bleach	90.3	95.0	87.1	89.1	90.0
Cleaners - Liquid Household	80.8	95.0	57.4	84.9	87.1
Cleaners - Powdered Household	88.1	87.0	92.4	93.6	91.3
Detergent - Hand	40.8	47.0	55.0	36.1	25.7
Detergent - Laundry	96.7	98.0	98.0	95.8	94.3
Dishwashing Liquid	94.9	99.0	94.1	93.3	92.9
Detergent - Dishwasher	17.0	22.0	25.1	10.9	10.0
Drain Openers	45.2	45.0	49.3	45.3	48.6
Fabric Softener	79.0	94.0	65.3	79.8	75.7
Floor Wax	33.8	37.0	29.9	28.6	40.0
Insecticides - House & Garden	80.5	78.0	75.2	81.5	90.0
Oven Cleaners	68.4	77.3	72.5	69.1	54.6
Paper Towels	95.6	94.0	97.0	93.3	100.0
Pine Oil Disinfectants	92.3	93.0	96.0	89.1	91.4
Plastic Bags	81.3	90.0	90.1	71.4	72.9
Toilet Bowl Cleaners	67.7	73.0	50.5	81.5	61.4
Window Cleaners	85.6	95.0	73.3	87.4	87.1

Source: Strategy Research Corporation

2. Hispanic Household Usage By Country Of Origin

a. Food and Beverage

Several Food and Beverage products registered a higher incidence of usage among households of Puerto Rican origin. For example, Baby Food in Jars registers an incidence of usage of 46.8% for households of Puerto Rican origin, whereas, Cuban and Mexican origin household usage were 19.3% and 21.6%, respectively. In addition, the highest levels of usage for Beans-Canned-Water & Salt and Beans-Canned-Ready To Eat were among households of Puerto Rican origin. Dog Food, Tea, Tomato Juice, Fruit Type Drinks and Canned Fruit were also most frequently consumed by Puerto Rican households.

The highest incidences of usage for Chewing Gum, Coffee-Ground-American Style, Mayonnaise and Prepared Salad Dressing were recorded by households of Mexican origin.

Households of Cuban origin register higher incidences of usage than households of other Hispanic origin for Yogurt, Gelatin/Pudding Powdered and Olive Oil.

1984
U.S. HISPANIC MARKET
INCIDENCE OF USE
FOOD AND BEVERAGE ITEMS
BY COUNTRY OF ORIGIN

	Mexico	Puerto Rico	Cuba	South America	Dominican Republic	Other
Baby Food - Jar	21.6%	46.8%	19.3%	29.0%	20.8%	20.8%
Beans - Canned - Water & Salt	28.7	72.6	38.6	38.7	75.0	45.5
Beans - Canned-Ready To Eat	46.1	62.9	50.0	45.7	75.0	62.6
Beer	52.1	67.7	64.8	71.0	41.7	72.7
Cheese - Sliced - Processed	76.6	83.1	68.2	80.6	62.5	81.8
Chewing Gum	82.6	80.6	43.2	54.8	54.2	63.6
Coffee - Ground - American	74.9	38.7	31.8	51.6	12.5	63.2
Coffee - Ground - Latin Style	20.4	75.8	83.0	58.1	95.8	45.9
Drinks - Fruit Type	79.0	90.3	72.7	77.4	83.3	72.7
Drinks - Children Powdered	38.9	38.7	34.1	32.3	54.2	27.3
Drinks - Orange Flavor Breakfast	56.9	51.6	31.8	71.0	41.7	27.3
Dog Food	22.8	30.6	34.1	32.3	54.2	27.3
Frozen Dinners	30.5	30.6	20.5	12.9	33.3	36.4
Fruit - Canned	61.1	82.5	78.4	67.7	62.5	63.5
Fruit Juice - Frozen	59.9	83.2	39.8	45.2	54.2	62.4
Fruit Nectars	52.7	85.1	77.3	71.0	62.5	63.9
Gelatin/Pudding - Powdered	72.5	85.5	86.4	64.5	70.8	72.7
Lunch Meats - Canned	43.1	17.7	26.1	16.1	33.3	54.5
Lunch Meats - Packaged	58.1	51.6	37.5	58.7	50.0	45.5
Malt Liquor	8.4	19.4	13.6	22.6	16.7	18.2
Margarine	83.8	69.7	85.2	77.4	83.3	90.8
Mayonnaise	95.8	93.5	80.7	93.5	87.5	100.0
Oil - Liquid Cooking and Salad	85.0	96.8	95.5	90.3	100.0	90.9
Olive Oil	55.1	69.4	88.6	77.4	83.3	72.7
Potato/Corn Chips	83.2	83.9	59.1	58.1	62.5	72.7
Rice - Regular	98.2	98.4	96.6	96.8	100.0	90.9
Salad Dressing - Prepared	75.6	48.4	47.9	48.4	45.5	36.4
Salad Dressing - Dry Mix	38.9	56.5	36.4	19.4	4.2	36.4

Continued. . .

1984
U.S. HISPANIC MARKET
INCIDENCE OF USE
FOOD AND BEVERAGE ITEMS BY COUNTRY OF ORIGIN
(Continued)

	Mexico	Puerto Rico	Cuba	South America	Dominican Republic	Other
Shortening	69.2	56.3	16.0	32.3	40.9	18.2
Soft Drink - Diet	35.5	39.1	30.9	35.5	50.1	27.4
Soft Drink - Regular	90.2	85.9	89.4	83.9	90.8	72.6
Spaghetti - Dry	89.2	85.8	78.7	80.6	86.4	90.1
Spaghetti - Canned	26.2	50.4	31.8	32.3	59.1	36.4
Spaghetti - Sauce	39.5	56.3	56.4	42.2	63.6	54.5
Tea	66.8	92.7	62.7	77.5	73.6	64.9
Tomato Juice	55.1	66.1	38.6	38.7	33.3	54.5
Tomato Paste - Canned	57.5	73.2	33.1	71.1	63.7	27.3
Tomato Sauce - Canned	87.8	85.9	92.6	83.7	94.5	72.5
Tuna - Canned	88.4	91.6	85.1	82.9	100.0	92.9
Vegetables - Canned	61.5	73.7	63.8	80.9	59.0	52.5
Vegetables - Frozen	46.3	69.3	44.7	47.4	62.6	61.7
Vegetable Juice - Mixed	55.1	56.5	42.0	45.2	37.5	54.5
Yogurt	58.1	59.3	63.2	58.0	60.7	65.3

Source: Strategy Research Corporation

b. Health and Beauty Aids

Usage of Arthritis Remedies recorded a higher incidence among households of Mexican origin. In addition, Mexican households registered a high incidence of usage for Deodorant, Facial Tissues, Indigestion/Upset Stomach Remedies, Laxatives, Ointments/Rubs and Shaving Cream.

Households of Cuban origin recorded the highest incidences of usage for Hair Spray, Lipstick and After Shave Lotion.

Sunburn Products, Suntan Lotion, Cream Rinse/Conditioners and Eye Make-Up usage register the highest incidences among households of Puerto Rican origin.

1984
INCIDENCE OF USE
HISPANIC HOUSEHOLDS
HEALTH AND BEAUTY AIDS
BY COUNTRY OF ORIGIN

	Mexico	Puerto Rico	Cuba	Central/ South America	Dominican Republic	Other
After Shave Lotion (Males)	72.4%	50.6%	85.7%	66.7%	75.0%	50.0%
Arthritis Remedies	40.7	20.3	33.1	32.3	36.4	36.4
Bath/Bar Soap	98.9	99.1	99.5	98.8	99.1	99.3
Cold Remedies-Tablets	89.5	82.8	61.7	90.3	77.3	63.6
Cold Remedies-Liquid	86.0	76.6	46.8	71.0	81.8	54.5
Cough Syrup	85.5	85.9	52.1	71.9	77.3	81.8
Cream Rinse/Conditioner	70.9	90.6	70.2	90.3	86.4	85.2
Deodorant	98.3	92.2	94.7	96.8	100.0	97.1
Disposable Baby Diapers	26.2	43.8	14.9	16.1	36.6	18.4
Eye Make-Up (Females)	77.6	87.3	67.5	80.7	77.9	77.8
Facial Tissues	93.2	61.1	77.0	91.5	91.0	87.5
Hair Coloring (Females)	34.3	37.1	47.5	48.3	38.9	66.7
Hair Spray (Females)	40.6	39.3	54.8	46.7	33.3	58.9
Hand Lotion	92.4	85.5	73.4	92.4	76.2	95.8
Headache Remedies	37.3	45.4	50.4	36.5	68.3	63.7
Indigestion/Upset Stomach Remedies	88.4	46.8	85.1	80.6	91.9	72.7
Laxatives	56.4	25.1	42.6	54.8	41.9	18.3
Lipstick (Females)	81.8	81.5	93.8	84.2	83.3	97.3
Mouthwash	75.7	65.2	68.1	79.5	86.9	59.1
Ointment/Rubs	69.2	64.6	48.5	66.7	59.9	59.0
Pantyhose (Females)	78.8	81.8	65.3	96.0	82.4	85.7
Perfumes/(Toilet Water Females)	90.2	94.5	93.1	98.8	88.2	95.8
Shampoo	98.3	97.5	98.7	97.2	99.0	98.5
Shaving Cream (Males)	89.7	66.7	52.6	66.7	66.7	66.7
Sunburn Products	33.9	46.5	17.7	42.2	45.7	42.4
Suntan Lotion	35.6	41.7	25.3	36.6	48.7	39.1
Toothpaste	99.4	99.3	99.7	98.6	97.5	99.1
Vitamins	58.2	62.1	44.2	78.6	76.3	38.1

Source: Strategy Research Corporation

e. Cleaners and Paper Goods

Cleaners such as Liquid Household, Dishwashing Liquid and Fabric Softeners recorded the highest incidences for usage among households of Puerto Rican origin.

Households of Cuban origin recorded the highest incidences of usage for Laundry Detergent and Pine Oil Disinfectants.

House and Garden Insecticides registered the highest incidence of usage among households of Mexican origin.

1984
INCIDENCE OF USE
HISPANIC HOUSEHOLDS
CLEANERS AND PAPER GOODS
BY COUNTRY OF ORIGIN

	Mexico	Puerto Rico	Cuba	Central/ South America	Dominican Republic	Other
Air Fresheners/ Room Deodorizers	62.6%	63.2%	59.2%	74.0%	45.6%	78.8%
Bleach	89.1	94.4	86.8	96.1	95.0	57.4
Cleaners-Liquid Household	85.4	95.3	57.1	90.3	87.0	80.1
Cleaners-Powdered Household	77.2	82.8	88.3	96.8	86.7	66.3
Detergent-Hand	32.1	21.6	54.2	47.9	73.4	39.6
Detergent-Laundry	94.7	95.8	98.9	96.8	91.3	94.1
Dishwashing-Liquid	93.0	98.3	93.3	96.5	91.0	92.3
Detergent-Dishwasher	21.2	23.1	43.7	17.8	20.1	19.8
Drain Openers	43.5	48.4	47.2	25.9	43.6	20.1
Fabric Softeners	77.8	91.6	61.0	89.4	89.1	61.4
Floor Wax	34.1	34.5	29.2	38.9	17.5	19.2
Insecticides-House and Garden	82.3	74.0	82.1	83.2	64.5	58.7
Oven Cleaners	58.2	75.7	70.3	62.5	52.4	60.5
Paper Towels	95.9	93.8	95.6	96.8	95.7	94.2
Pine Oil Disfectants	90.1	89.1	92.4	91.5	88.2	91.6
Plastic Bags	70.3	86.8	88.8	95.7	94.6	95.1
Toilet Bowl Cleaners	72.5	67.2	47.3	93.5	78.3	70.0
Window Cleaners	87.5	91.1	73.0	93.1	88.3	86.1

Source: Strategy Research Corporation

C. BRAND LOYALTY

Hispanics were asked whether they usually stay with one brand or switched frequently.

Almost one out of four Hispanic consumers (23.1%) reportedly changed frequently while 36.9% said they were loyal to their brands. The remaining 40.0% said that it depended....

1984
U. S. HISPANIC MARKET
BRAND LOYALTY

	Total	New York	Florida	California	Texas/ Southwest
Change	23.1%	30.7%	25.3%	17.3%	25.3%
Stay	36.9	43.4	38.0	32.4	36.7
Depends....	40.0	25.9	36.7	50.3	38.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics in New York change brands most frequently (30.7%), while Hispanics in California change brands least (17.3%).

By Country of Origin

Hispanics who cited their country of origin as Puerto Rico change brands more frequently (36.4%), while Hispanics whose country of origin is Mexico change brands the least (22.8%).

1984
U. S. HISPANIC MARKET
BRAND LOYALTY
BY COUNTRY OF ORIGIN

	Cuba	Mexico	Puerto Rico	Central/ South America
Change	25.8%	22.8%	36.4%	31.5%
Stay	40.9	37.3	47.0	26.0
Depends...	33.3	39.9	16.6	42.5
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Hispanics from Puerto Rico are more brand loyal (47.0%) than the other groups. Latins from Central or South America are the least brand loyal (26.0%).

By Age

There are slight differences between age groups regarding brand loyalty and changing brands.

1984
U. S. HISPANIC MARKET
BRAND LOYALTY
BY AGE GROUP

	Total 18+	18 to 34	35 to 49
Change	23.1%	29.6%	26.6%
Stay	36.9	36.3	35.4
Depends...	40.0	34.1	38.0
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The younger 18 to 34 age group recorded the highest response rate for changing brands.

D. WEEKLY GROCERY EXPENDITURES

The average weekly grocery expenditure for a Hispanic family is approximately $98.50.

1984
U. S. HISPANIC MARKET
AVERAGE WEEKLY GROCERY EXPENDITURES BY MARKET AREA

	Average Weekly
Total U. S. Hispanic	$98.47
New York	101.36
Florida	97.43
California	99.12
Texas/Southwest	92.17

Source: Strategy Research Corporation

The dollars spent on groceries is highest in the New York market area where Hispanics spend an average of $101.36 weekly.

California Hispanics record the second highest weekly grocery expenditure ($99.12), while Hispanics in the Southwest spend the least amount of money weekly ($92.17).

X. MEDIA AVAILABILITY

X. MEDIA AVAILABILITY

With 17.6 million Hispanics residing in the U.S. today, the Spanish language has become widely recognized as a profitable and effective advertising medium. An ever increasing number of Spanish language radio and television stations, magazines and newspapers have made their way into this market.

As a target audience, Hispanics are particularly well-defined and accessible. Hispanic broadcast programming, especially music and other entertainment programming, is essentially characterized by the adherence to traditional Hispanic cultural values and by the use of the Spanish language. Accessibility to the Hispanic audience is facilitated by the fact that U.S. Hispanics are geographically concentrated and largely urban; they can therefore be effectively reached through the use of relatively few media outlets.

A. BROADCAST MEDIA

The growing recognition gained by the Spanish language format station as a direct link to the multi-million dollar Hispanic consumer market is evidenced by the on-going trend in broadcasting towards specialized programming designed to attract a specific segment of the overall audience. Radio long ago became a specialized medium, each format concentrating on appealing to a particular type of listener. Radio formats such as "Top Forty", "All News", "Country & Western", "Album Rock" and "Spanish", have all made a place for themselves in the market according to the type of audience they draw.

An ever increasing number of Spanish language radio stations is successfully providing programming and attracting significant audiences among United States Hispanics. In every U.S. Hispanic market, Spanish language radio is a major factor. The Los Angeles area has 7 full-time Spanish radio stations, El Paso has 4, New York City has 3, San Antonio has 4, Laredo has 3, San Diego has 3, Miami has 7, San Francisco/San Jose has 5 and the list continues to grow. In the U.S. mainland, there are approximately 80 full-time Spanish format radio stations with numerous stations also programming on a part-time basis in the Spanish language.

Spanish language television stations are also located in markets with high Hispanic concentrations.

SIN was the first U.S. television network to interconnect its affiliates full-time via satellite in 1976. The Network currently buys or produces programming and transmits it to more than 257 satellite-interconnected affiliates. These affiliates serve virtually every major U.S. Hispanic area. The Network presently has eleven conventional UHF affiliate stations. These are located in New York, Los Angeles, Miami, San Antonio, Fresno, San Francisco, Phoenix, Sacramento, Corpus Christi, Salinas and Dallas. The Network also has eleven Low Power Television Stations (LPTVs) serving Denver, Washington D.C., Hartford, Philadelphia, Albuquerque, Tucson, Bakersfield, Austin, Las Vegas, Tampa and Detroit. Additional LPTV affiliates are expected to begin telecasting in 1984. The third group of affiliates, and the fastest-growing, is the cable systems. Almost 230 systems, outside the areas covered by over-the-air affiliates, now carry SIN programming.

Lower Power Stations rebroadcast programming that originates from another station, although FCC rules now permit them to originate local programming.

Spanish stations serve as the primary source of news, information and entertainment for many of the Spanish speaking people in their coverage area. Generally, Spanish stations are active and effective advocates for the Hispanic community they serve, taking strong editorial positions and providing special programming on issues that affect their audience. In order of priority, news coverage on Spanish stations usually concentrates on events taking place in the local Hispanic community, news from the country of origin of the local Hispanic audience, local and national events of concern to the Hispanic community and news from the rest of the Hispanic world.

In entertainment programming, the emphasis is on Hispanic music and artists, characters and situations that are culturally attuned to the Hispanic. Many of the Spanish entertainment programs are imported, the majority originating from Mexico. In this regard, the dubbing of American programs into Spanish is avoided.

Spanish broadcasting relies on entertainment programming and on news from the country of origin to offer a media environment which presents a view of the world as perceived by Hispanics. Spanish broadcasting offers programming that is credible, relevant and emotionally tuned to Hispanics. This combination of informational and emotional ties to Hispanic cultural values and to country of origin creates an appeal that is stronger than the sum of its parts, particularly as reinforced by their presence within a Spanish language framework.

Concurrent with its role as a direct connection to the Hispanic's language, culture and country of origin, the Spanish language station also serves as the individual voice of a unique local Hispanic community. The nature of the Spanish station's newscasts, editorials, public service and special programming reflects the station's abiding interest in its audience. Deep involvement in the community they serve is characteristic of Spanish stations, particularly among those that are most successful in drawing sizable audiences.

The various appeals which Spanish broadcasting offers the Hispanic result in a high degree of audience loyalty to Spanish stations. Additionally, the Hispanic usually identifies very strongly with a particular Spanish station. It is not rare for the Hispanic to have the radio or television set unwaveringly tuned to his or her favorite Spanish station throughout the day and night.

The strong identification of the Hispanic audience with Spanish format stations contributes greatly to the effectiveness of the advertising which the station carries. The comfortable programming environment provided by the station, the built-in credibility which it enjoys, the emotional ties to language and culture, they are all extended by association to the station's advertisements. The Hispanic also appreciates the fact that the product advertising in Spanish on his station has made a special effort to present the product to him.

SPANISH FORMAT STATION LISTING

TELEVISION

ARIZONA

Phoenix

KTVW (Channel 33) (SIN)
3019 E. Southern Avenue
Phoenix, 85040
General Manager: Jose Cancela
(602) 243-3333

CALIFORNIA

El Centro-Yuma (Arizona)

KECY (Channel 9)
646 Main Street
El Centro, 92244
General Manager: Randy Campbell
(714) 353-9990

Fresno

KFTV (Channel 21) (SIN)
1857 Fulton Street, Suite 1
Fresno, 93721
General Manager: August Ruiz
(209) 268-4204

Los Angeles

KMEX (Channel 34) (SIN)
5420 Melrose
Hollywood, 90038
General Manager: Daniel Villanueva
(213) 466-8131

KSCI (Channel 18)
1950 Cotner Avenue
West Los Angeles, 90025
General Manager: Paul Niedermeyer
(213) 479-8081

Sacramento

KCSO (Channel 19) (SIN)
Box 3689
Modesto, 95352
General Manager: Sharon D. Sepulveda
(209) 527-3060

Salinas-Monterey

KCBA (Channel 35) (SIN)
P.O. Box 3560, 646 E. Alisal
Salinas, 93905
General Manager: Chester Smith
(408) 422-3500

San Francisco-Oakland

KDTV (Channel 14) (SIN)
2200 Palou Avenue
San Francisco, 94124
General Manager: Emilio Nicolas, Jr.
(415) 641-1400

KTZO (Channel 20)
2500 Marin Street
San Francisco, 94124
General Manager: Michael Lincoln
(415) 285-6420

FLORIDA

Miami

WLTV (Channel 23) (SIN)
2525 S.W. Third Avenue, Suite 408
Miami, 33129
General Manager: Joaquin Blaya
(305) 856-2323

ILLINOIS

Chicago

WBBS (Channel 60)
5525 N. Broadway
Chicago, 60640
General Manager: Marcelino Miyares
(312) 271-7171

WCIU (Channel 26) (SIN)
141 W. Jackson
Chicago, 60604
General Manager: Howard Shapiro
(312) 663-0260

NEW YORK

New York City

WNJU (Channel 47)
425 Park Avenue
New York, 10022
General Manager: Carlos Barba
(212) 935-3480

WXTV (Channel 41) (SIN)
24 Meadowland Parkway
Secaucus, New Jersey 07094
General Manager: Ivan Egas
(201) 348-4141

TEXAS

Corpus Christi

KORO (Channel 28) (SIN)
102 N. Mesquite
Corpus Christi, 78401
General Manager: Servando Caballero
(512) 883-2823

Dallas

KNBN (Channel 33) (SIN)
3333 Harry Hines Boulevard
Dallas, 75201
General Manager: Ray Schon Bak
(214) 760-8833

San Antonio

KWEX (Channel 41) (SIN)
Box 9225, 411 East Durango
San Antonio, 78204
General Manager: Emilio Nicolas
(512) 227-4141

SPANISH FORMAT
STATION LISTING

RADIO

ARIZONA

Douglas

KDAP (AM) 1450 KHz
P.O. Box 1179
Douglas, 85607
General Manager: Marvin G. Rivenburgh
(602) 364-3484

Nogales

KFBR (AM) 1340 KHz
P.O. Box 1569
Nogales, 85621
General Manager: Bernard Wilson
(602) 287-5675

XEHF (AM) 1370 KHz
P.O. Box 519
Nogales, 85621
(602) 765-1402

Phoenix

KNNN (FM) 99.9 MHz
4548 W. Osborn Road
Phoenix, 85031
General Manager: Julia Zozaya
(602) 269-5666

KPHX (AM) 1480 KHz
1975 S. Central Avenue
Phoenix, 85004
General Manager: Freddy Morales
(602) 257-1351

KVVA (AM) 860 KHz
147 E. Garfield
Phoenix, 85001
General Manager: Bob Feinman
(602) 257-9363

Tucson

KXEW (AM) 1600 KHz
889 W. El Puente Lane
Tucson, 85713
General Manager: Patricio Barraza
(602) 623-6429

Willcox

KHIL (AM) 1250 KHz
P.O. Box 1250, West Patte Road
Willcox, 85643
General Manager: Glen Nelson
(602) 384-4244

Winslow

KINO (AM) 1230 KHz
Drawer K
Winslow, 36047
General Manager: Loy Engelhardt
(602) 289-3364

CALIFORNIA

Bakersfield

KWAC (AM) 1490 KHz
5200 Standard
Bakersfield, 93308
General Manager: Edward R. Hopple
(805) 327-9711

Calexico

XECL (AM) 990 KHz
233 E. 4th Street, Suite 108
Calexico, 92231
General Manager: Armando Maldonado
(714) 357-4843

Ceres

KLOC (AM) 920 KHz
2842 Iowa Avenue
Modesto, 95353
General Manager: Mike Sturtevant
(209) 521-5562

Coachella

KVIM (FM) 93.7 MHz
P.O. Box 401
Indio, 92201
General Manager: Gilberto P. Esquivel
(714) 398-2171

Corona

KWRM (AM) 1370 KHz
210 Park Ridge Road
Corona, 91720
General Manager: Pat Michaels
(714) 737-1370

Dinuba

KOJY (Formerly KLTA) (FM) 98.9 MHz
597 N. Alta Avenue
Dinuba, 93618
General Manager: Scott W. Moseley
(209) 591-1130

KRDU (AM) 1130 KHz
597 N. Alta
Dinuba, 93618
General Manager: Donna L. Hofer
(209) 591-1130

El Centro

XEAO (AM) 910 KHz
233 E. 4th Street, Suite 108
Calexico, 92231
General Manager: Armando Maldonado
(714) 357-4843

XED (AM) 1050 KHz
233 E. 4th Street, Suite 108
Calexico, 92231
General Manager: Armando Maldonado
(714) 357-4843

XEMBC (AM) 1190 KHz
7373 University Boulevard
La Mesa, 92073
General Manager: Mario Mayanos
(714) 286-3090

Fresno

KGST (AM) 1600 KHz
Box 11868
Fresno, 93775
General Manager: Benjamin Gutierrez
(209) 266-9901

KXEX (AM) 1550 KHz
Box 12223
Fresno, 93250
General Manager: John Sonder
(209) 233-8803

Gilroy

KAZA (AM) 1290 KHz
59 N. Monterey
Gilroy, 95020
General Manager: Judy Castillo Murray
(408) 984-1290

Hollister-Salinas

KMPG (AM) 1520 KHz
P.O. Box 1414
Hollister, 95023
General Manager: Gilberto de Leon
(408) 637-7476

Lemoore

KQIQ (AM) 1320 KHz
P.O. Box 1320
Hanford, 93232
General Manager: Richard Dixon
(209) 484-4466

Lodi

KCVR (AM) 1570 KHz
19250 N. Lower Sacramento Road
Lodi, 95240
General Manager: George L. Sampson
(209) 368-0626

Lompoc

KNEZ (AM) 960 KHz
322 N. "H" Street, Suite A
Lompoc, 93436
General Manager: Paul Nichols
(805) 736-3496

Los Angeles

KALI (AM) 1430 KHz
5723 Melrose Avenue
Hollywood, 90038
General Manager: Raul Otarl
(213) 466-6161

KLVE (FM) 107.5 MHz
5724 Hollywood Boulevard
Hollywood, 90028
General Manager: Elias Liberman
(213) 465-3171

KMAX (FM) 107.1 MHz
3844 E. Foothill Boulevard
Pasadena, 91107
General Manager: Darby Cunningham
(213) 681-2486

KTNQ (AM) 1020 KHz
5724 Hollywood Boulevard
Hollywood, 90028
General Manager: Elias Liberman
(213) 465-3171

KWKW (AM) 1300 KHz
6777 Hollywood Boulevard
Hollywood, 90028
General Manager: Jose Cabrera
(213) 466-8111

Los Banos

KLBS (AM) 1330 KHz
P.O. Box 1428
Los Banos, 93635
General Manager: Mike McAdam
(209) 826-0578

Madera-Merced

KHOT (AM) 1250 KHz
P.O. Box 67
Madera, 93639
General Manager: David Powell
(209) 674-8887

McFarland

KXEM (AM) 1590 KHz
P.O. Box 326
McFarland, 93250
General Manager: Mary Helen Barro
(805) 792-2128

Ontario

KNSE (AM) 1510 KHz
8729 E. 9th Street
Rancho Cucamonga, 91730
General Manager: Tom Castro
(714) 981-8893

Oxnard-Ventura

KOXR (AM) 910 KHz
418 W. Third Street
Oxnard, 93030
General Manager: Manuel Perez
(805) 487-0444

Palm Springs-Indio

KRCQ (AM) 1400 KHz
Box KRCQ
Indio, 92202
General Manager: Terry Ayers
(714) 347-3403

Sacramento

KRCX (Formerly KPIP) (AM) 1110 KHz
8842 Quail Lane
Roseville, 95768
General Manager: William M. Cloatier
(916) 791-4111

Salinas

KCTY (AM) 930 KHz
Box 1939
Salinas, 93902
General Manager: Martin L. Kline, Jr.
(408) 449-2421

KLFA (FM) 92.1 MHz
124 North Second
King City, 93930
General Manager: Reinaldo Rodriguez
(408) 385-3268

KRAY (FM) 980.0 MHz
Box 1939
Salinas, 93902
General Manager: Martin L. Kline, Jr.
(408) 449-2421

San Bernardino

KCAL (AM) 1410 KHz
Box 390
Redlands, 92373
General Manager: Andy James
(714) 793-2757

San Diego

XEMO (AM) 860 KHz
500 Fesler
El Cajon, 92020
General Manager: Gustavo Astiazaran
(714) 442-9469

XERCN (AM) 1470 KHz
P.O. Box 377
San Ysidro, 92073
General Manager: Jose M. Sanchez
(903) 385-6686

XEXX (AM) 1420 KHz
Box 648
San Ysidro, 92073
General Manager: Gustavo Lopez Moreno

XPRS (AM) 1090 KHz
1330 S. Vermont Avenue
Los Angeles, 90006
General Manager: Teddy Fregoso
(213) 387-1115

San Francisco-Oakland

KBRG (FM) 105.3 MHz
39879 Paseo Padre Pkwy.
Fremont, 94538
General Manager: Terry Crosby
(415) 490-3323

KIQI (AM) 1010 KHz
2601 Mission Street
San Francisco, 94110
General Manager: Rene de la Rosa
(415) 648-8800

KITS (FM) 105.3 MHz
50 Ninth Street
San Francisco, 94103
General Manager: Jerry E. McKenna
(415) 626-1053

KOFY (AM) 1050 KHz
1818 Gilbreth Road
Burlingame, 94010
General Manager: Rolando Orellana
(415) 692-2433

San Jose

KDOS (FM) 104 MHz
P.O. Box 1430
Fremont, 94538
General Manager: Inez Martinez
(415) 490-3323

KNTA (AM) 1430 KHz
1241 Franklin Mall
Santa Clara, 95052
General Manager: Gene Hogan
(408) 244-1430

Santa Maria-Santa Barbara

KZON
114 N. Vine Street
Santa Maria, 93454
General Manager: Bob Perez
(805) 928-4334

Stockton

KSTN (FM) 107.3 MHz
2171 Ralph Avenue
Stockton, 95206
General Manager: Knox La Rue
(209) 948-5786

KMLO (AM) 1000 KHz
1591 E. Vista Way
Vista, 92083
General Manager: Gene Alfred
(714) 724-8333

Watsonville

KOMY (AM) 1340 KHz
40 Atkinson Lane
Watsonville, 95077
General Manager: Phil Rather
(408) 724-5641

COLORADO

Alamosa

KGIW (AM) 1450 KHz
292 Santa Fe Avenue
Alamosa, 81101
General Manager: Neil H. Hammer
(303) 589-6644

Denver

KBNO (AM) 1220 KHz
4760 Tejon Street
Denver, 80211
General Manager: Edward O. Romero
(303) 455-0275

Grand Junction

KSTR (AM) 620 KHz
910 Main
Grand Junction, 81501
General Manager: Bill R. Shoultz
(303) 243-1722

Greeley

KFKA (AM) 1310 KHz
1025 Ninth Street
Greeley, 80631
General Manager: Ray Ebert
(303) 356-1310

Pueblo

KAPI (AM) 690 KHz
2829 Lowell Boulevard
Pueblo, 81003
General Manager: Andres Neidig
(303) 545-2883

KRMX (AM) 690 KHz
2829 Lowell Boulevard
Pueblo, 81003
General Manager: Andres Neidig
(303) 545-2883

KRMX (FM) 107.1 MHz
2829 Lowell Boulevard
Pueblo, 81003
General Manager: Andres Niedig
(303) 545-2883

CONNECTICUT

Bridgeport

WNAB (AM) 1450 KHz
474 E. Washington Avenue
Bridgeport, 06608
General Manager. Harry Lawson II
(203) 333-5551

Hartford-New Britain

WLVH (FM) 93.7 MHz
11 Asylum Street
Hartford, 06103
General Manager: Jose Grimalt
(203) 549-1175

WRYM (AM) 840 KHz
1056 Willard Avenue
Newington, 06111
General Manager: Barry A. Kursman
(203) 666-5646

New London

WNLC (AM) 1510 KHz
P.O. Box 1031
New London, 06320
General Manager: Gary Gerard
(203) 442-5328

Norwalk

WNLK (AM) 1350 KHz
P.O. Box 1350
Norwalk, 06852
General Manager: Michael F. Hanson
(203) 838-5566

DISTRICT OF COLUMBIA

WHFS (FM) 102.3 MHz
4853 Cordell Avenue
Bethesda, 20814
General Manager: Jake Einstein
(301) 656-0600

WHUR (FM)
2600 Fourth Street N.W.
Washington, 20059
General Manager: Robert N. Taylor
(202) 232-6000

WMDO
2647 University Boulevard West
Wheaton, 20902
General Manager: Alan S. Klamer
(301) 933-6920

FLORIDA

Clermont-Orlando

WWFL (AM) 1340 KHz
Box 948
Clermont, 32711
General Manager: H. Sharp
(904) 394-2000

Immokalee

WKEM (AM) 1490 KHz
P.O. Box 520, West Immokalee Drive
Immokalee, 33934
General Manager: Gerard Arthur
(813) 657-3651

Kissimmee-Orlando

WFIV (AM) 1080 KHz
P.O. Drawer 5519
Orlando, 32805
General Manager: Edward C. Allmon
(305) 425-0623

WMJK (AM) 1220 KHz
445 N. Wymore, Suite 200
Winter Park, 32789
General Manager: Bebo Kramer
(305) 628-8862

Miami

WCMQ (AM) 1220 KHz
1411 Coral Way
Miami, 33145
General Manager: H. Dolgoff
(305) 854-1830

WCMQ (FM) 92.1 MHz
1411 Coral Way
Miami, 33145
General Manager: H. Dolgoff
(305) 854-1830

WOCN (AM) 1450 KHz
999 S. Bayshore Drive, Suite 304
Miami, 33145
General Manager: George Fiterri
(305) 371-1450

WQBA (AM) 1140 KHz
701 S.W. 27th Avenue
Miami, 33135
General Manager: George Hyde
(305) 643-5000/649-8989

WQBA (FM) 107.5 MHz
701 S.W. 27th Avenue
Miami, 33135
General Manager: George Hyde
(305) 643-5000/649-8989

WRHC (AM) 1550 KHz
2260 S.W. 8th Street, Suite 303
Miami, 33135
General Manager: Salvador Lew
(305) 541-3302

WSUA (AM) 1260 KHz
825 41st Street
Miami, 33140
General Manager: Herb Levin
(305) 674-1260

Tampa-St. Petersburg

WAMA (AM) 860 KHz
5203 N. Armenia Avenue
Tampa, 33603
General Manager: Victor Lanz
(813) 879-8600

WTYM (AM) 1300 KHz
1711 W. Kennedy Boulevard
Tampa, 33606
General Manager: Monroe E. Berkman
(813) 256-1300

WYOU (AM) 1550 KHz
P.O. Box 1988
Tampa, 33601
General Manager: John Rhea
(813) 253-6071

IDAHO

Blackfoot

KBLI (AM) 690 KHz
P.O. Box 699
Blackfoot, 83221
General Manager: Rubard Stoddart
(208) 785-1400

Mountain Home

KFLI (AM) 1240 KHz
P.O. Box 704
Mountain Home, 83647
General Manager: Jay Pipes
(208) 587-8424

Nampa

KXTC (AM) 1340 KHz
P.O. Box 1340
Nampa, 83651
General Manager: Dan Myers
(208) 466-1340

ILLINOIS

Chicago

WBMX (FM) 102.7 MHz
408 S. Oak Park Avenue
Oak Park, 60302
General Manager: Kernie L. Anderson
(312) 626-1030

WCEV (AM) 1450 KHz
5356 West Belmont Avenue
Chicago, 60641
General Manager: Lucyna Migala
(312) 282-6700

WEDC (AM) 1240 KHz
5475 Milwaukee Avenue
Chicago, 60630
General Manager: Ms. A.B. Pucinski
(312) 631-0700

WCRW (AM) 1240 KHz
2756 Pine Grove Avenue
Chicago, 60614
General Manager: Edward W. Jacker
(312) 327-6860

WOJO (FM) 105.1 MHz
2425 Main Street
Evanston, 60202
General Manager: Athena Sofios
(312) 273-4010

WOPA (AM) 1490 KHz
408 S. Oak Park Avenue
Oak Park, 60302
General Manager: Sidney Schneider
(312) 848-5760

WSBC (AM) 1240 KHz
4949 W. Belmont Avenue
Chicago, 60641
General Manager: Daniel R. Lee
(312) 777-1700

WTAQ (AM) 1300 KHz
9355 W. Joliet Road
La Grange, 60525
General Manager: William H. Wardle
(312) 352-1300

WVVX (FM) 103.1 MHz
210 Skokie Valley Road
Highland Park, 60035
General Manager: William E. Paar, Jr.
(312) 831-5250

Joliet

WJRC (AM) 1510 KHz
57 W. Jefferson Street
Joliet, 60434
General Manager: William Lipsey
(815) 727-5176

Sterling

WSDR (AM) 1240 KHz
P.O. Box 399
Sterling, 61081
General Manager: Lindsay Wood Davis
(815) 625-3540

INDIANA

Elwood

WBMP (FM) 101.7 MHz
P.O. Box 101
Elwood, 46036
General Manager: Stan Barton
(317) 552-5043

Gary

WWCA (AM) 1270 KHz
545 Broadway
Gary, 46402
General Manager: Sylvia Burns
(219) 886-9176

Hammond

WJOB (AM) 1230 KHz
64015 Olcott Avenue
Hammond, 46320
General Manager: Julian Colby
(219) 844-1230

South Bend

WNDU (AM) 1490 KHz
P.O. Box 1616
South Bend, 46634
General Manager: Bazil O'Hagan
(219) 239-1616

LOUISIANA

New Orleans

KGLA (AM) 1540 KHz
P.O. Box 428
Marrero, 70073
General Manager: Alberto Carrillo
(504) 347-8491

MASSACHUSETTS

Boston

WUNR (AM) 1600 KHz
160 Washington Street
Boston, 02114
General Manager: Jane Duncklee
(617) 367-9003

Lawrence

WCCM (AM) 800 KHz
33 Franklin Street
Lawrence, 01840
General Manager: John Bassett
(617) 683-7171

Springfield–Holyoke–Chicopee

WQXQ
34 Sylvan Street
West Springfield, 01089
General Manager: Manuel Angelo
(413) 781-5200

MICHIGAN

Detroit

WCAR (AM) 1090 KHz
32500 Park Lane
Garden City, 48135
General Manager: Jack Bailey
(313) 525-1111

Holland

WHTC (AM) 1450 KHz
87 Central Avenue
Holland, 49423
General Manager: Mike Walton
(616) 392-3121

Saginaw

WKNX (AM) 1210 KHz
5200 State Street
Saginaw, 48603
General Manager: Robert Dyer
(517) 799-1000

MINNESOTA

Minneapolis–St. Paul

KDAN (AM) 1370 KHz
6541 Military Road
Newport, 55055
General Manager: Mike L. Scroggins
(612) 459-1370

KUXL (AM) 1570 KHz
5730 Duluth Street
Minneapolis, 55422
General Manager: John McCooley
(612) 544-3196

NEBRASKA

Scottsbluff

KMOR (FM) 92.9 MHz
2002 Char Avenue
Scottsbluff, 69361
General Manager: Michael J. Tracy
(308) 632-5667

NEW MEXICO

Albuquerque–Belen

KABQ (AM) 1350 KHz
1309 Yale Southeast
Albuquerque, 87106
General Manager: Frank Elders
(505) 243-1744

KARS (AM) 860 KHz
208 N. Second
Belen, 87002
General Manager: Bill Brooks
(505) 864-7447

KLTN (AM) 1420 KHz
5100 Montgomery Boulevard, N.E.
Albuquerque, 87109
General Manager: Joe Berume
(505) 883-5608

KXKS (AM) 1190 KHz
889 Sunset Road, S.W.
Albuquerque, 87105
General Manager: Rafael Rosales
(505) 843-7831

Artesia

KSVP (AM) 990 KHz
317 West Quay
Artesia, 88210
General Manager: Dave Button
(505) 746-2751

Carlsbad

KBAD (AM) 740 KHz
714 N. Canyon
Carlsbad, 88220
General Manager: Bob Swayze
(505) 885-2151

KBAD (FM) 92.1 MHz
714 N. Canyon
Carlsbad, 88220
General Manager: Bob Swayze
(505) 885-2151

Clovis

KICA (AM) 980 KHz
1000 Sycamore Street
Clovis, 88101
General Manager: Don Coates
(505) 763-5511

Espanola-Santa Fe

KDCE (AM) 970 KHz
Box 970
Santa Fe, 87501
General Manager: Richard L. Garcia
(505) 982-4444

Gallup

KYVA (AM) 1230 KHz
P.O. Drawer K., 306 S. 1 Street
Gallup, 87301
General Manager: Sammy Chioda
(505) 865-6222

Hobbs

KUUX (Formerly KWEW) (AM) 1480 KHz
1515 N. Del Prado
Hobbs, 88240
General Manager: Bob Wood
(505) 393-3137

Las Vegas

KNMX (AM) 540 KHz
615 Lincoln Avenue
Las Vegas, 87701
General Manager: Carlos Lopez
(505) 425-3555

Roswell

KRDD (AM) 1320 KHz
P.O. Box 1615
Roswell, 88201
General Manager: Reginaldo Espinosa, Jr.
(505) 624-2663

Silver City

KSK (AM) 1340 KHz
Box 590
Silver City, 88061
General Manager: Robert F. Meskill
(505) 538-2951

Taos

KKIT (AM) 1340 KHz
Box 737, KKIT Lane
Taos, 87571
General Manager: Stuart C. Jones
(505) 758-2231

NEVADA

Henderson

KVOV (AM) 1280 KHz
Box 400
Henderson, 89015
General Manager: Robert Blum
(702) 564-2591

NEW JERSEY

Elizabeth

WJDM (AM) 1530 KHz
9 Caldwell Place
Elizabeth, 07201
General Manager: John Quinn
(201) 965-1530

Plainfield

WERA (AM) 1590 KHz
120 W. 7th Street
Plainfield, 07060
General Manager: Henry J. Behre
(201) 755-1590

Vineland

WDUL (AM) 1270 KHz
632 Maurice River Boulevard
Vineland, 08360
General Manager: Vita Marie Ventresca
(609) 691-7233

WREY (AM) 1440 KHz
P.O. Box 1440
South Vineland, 08360
General Manager: Joseph F. Coccaro
(609) 327-4141

NEW YORK

Amsterdam

WKOL (AM) 1570 KHz
Box 3
Amsterdam, 12010
General Manager: Ray Arthur
(518) 843-1570

Babylon-Long Island

WGLI (AM) 1290 KHz
1290 Peconic Avenue
Babylon, 11704
General Manager: Andrew R. Pettit
(516) 669-1290

Dunkirk

WDOE (AM) 1410 KHz
Willow Road
Dunkirk, 14048
General Manager: Robert Finley
(716) 366-1410

New York City

WADO (AM) 1280 KHz
666 Third Avenue
New York, 10017
General Manager: Ricardo Fernandez
(212) 599-2701

WBNX (AM) 1380 KHz
P.O. Box 1380
Carlstadt, New Jersey 07072
General Manager: Joseph G. Schweighardt
(212) 594-1380

WJIT (AM) 1480 KHz
655 Madison Avenue
New York, 10021
General Manager: Mel Karmazin
(212) 935-5170

Rochester

WDKX (FM) 104.0 MHz
1337 Main Street, E.
Rochester, 14609
General Manager: Andrew A. Langston
(716) 288-5470

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Cleveland

WZAK (FM) 93.1 MHz
1303 Prospect Avenue
Cleveland, 44115
General Manager: Xenophen Zapis
(212) 621-9300

WMEX (FM) 100.9 MHz
1859 W. McPherson Highway
Clyde, 43410
General Manager: Erasmo Cruz, Sr.
(419) 547-8792

PENNSYLVANIA

Lancaster

WLAN (AM) 1390 KHz
252 N. Queen Street
Lancaster, 17603
General Manager: Samuel M. Altdoerffer
(717) 394-7261

Philadelphia

WIBF (FM) 103.9 MHz
Jenkintown, 19046
General Manager: Douglas Henson
(215) 886-2000

WTEL (AM) 860 KHz
4140 Old York Road
Philadelphia, 19140
General Manager: Quentin Sturn
(215) 455-9200

RHODE ISLAND

Providence

WICE (AM) 1290 KHz
1110 Douglas Avenue, North
Providence, 02904
General Manager: Antonio Costa
(401) 273-7000

TEXAS

Alice

KDSI (FM) 92.1 MHz
P.O. Box 731
Alice, 78332
General Manager: Royce McGaughey
(512) 668-9204

Amarillo

KZIP (AM) 1310 KHz
3309 S. Georgia
Amarillo, 79109
General Manager: Ken Williams
(806) 359-8561

Austin

KMMM
3801 N. Lamar, Box 1208
Austin, 78767
General Manager: Jim Ray
(512) 454-2682

KOKE (FM) 95.5 MHz
3108 N. Lamar, Box 1208
Austin, 78767
General Manager: Jim Ray
(512) 454-2561

Bay City

KIOX (AM) 1270 KHz
Highway 35 East, P.O. Box 1391
Bay City, 77414
General Manager: Marie Mulligan
(713) 245-4642

Beeville

KIBL (AM) 1490 KHz
Box 700
Beeville, 78102
General Manager: Ed Lovelace
(512) 358-1490

Bishop

KFLZ (FM) 107.1 MHz
110 E. Main Street
Bishop, 78363
General Manager: Joe Cisneros
(512) 584-2915

Brownfield

KKUB (AM) 1300 KHz
1722 Tahoka Road
Brownfield, 79316
General Manager: Jim Farr
(806) 637-4531

Bryan

KTAM (AM) 1240 KHz
Box 3069
Bryan, 77805
General Manager: Ben Downs
(713) 822-0693

KORA (FM) 98.3 MHz
1240 Villa Maria Road
Bryan, 77801
General Manager: Ben Downs
(713) 822-0693

Carrizo Springs

KBEN (AM) 1450 KHz
203 S. Fourth Street
Carrizo Springs, 77834
General Manager: Walter H. Herbert, Jr.
(512) 876-2210

Corpus Christi

KCCT (AM) 1150 KHz
Box 5206
Corpus Christi, 78405
General Manager: Manuel Davila Sr.
(512) 289-0999

KUNO (AM) 1400 KHz
P.O. Drawer 4722
Corpus Christi, 78408
General Manager: Luis A. Munoz
(512) 884-5203

Eagle Pass

KEPS (AM) 1270 KHz
Box 1123
Eagle Pass, 78852
General Manager: Doug Stalker
(512) 773-9246

XEMU (AM) 580 KHz
P.O. Box 196
Eagle Pass, 78852
General Manager: Claudio Bres

El Campo

KULP (AM) 1390 KHz
P.O. Box 1390, 515 E. Jackson Street
El Campo, 77437
General Manager: Jerry Aulds
(713) 543-3303

El Paso

KAMA (AM) 1060 KHz
4150 Pinnacle Street, Suite 120
El Paso, 79902
General Manager: John Frankhouser
(915) 544-7600

KAMZ (FM) 93.1 MHz
4150 Pinacle Street, Suite 120
El Paso, 79902
General Manager: John Frankhouser
(915) 544-7600

XEROK (AM) 800 KHz
Suite 100, 1140 Airway Boulevard
El Paso, 79925
General Manager: John Doran
(915) 778-9886

XEWG (AM) 1240 KHz
1140 Airway Boulevard, Suite 103
El Paso, 79925
General Manager: John W. Doran
(915) 778-9886

Falfurrias

KPSO (AM) 1260 KHz
Box 309
Falfurrias, 78355
General Manager: Raymond O. Creely
(512) 325-2112/3311

Ft. Worth/Dallas

KESS (FM) 94.1 MHz
Box 6195
Fort Worth, 76115
General Manager: Marcos A. Rodriguez
(817) 429-1037

KSSA (AM) 1270 KHz
5915 Pioneer Parkway
Arlington, 76013
General Manager: Ed. R. Robbins
(817) 457-1270/429-1270

KUQQ (Formerly KTIA) (AM) 1450 KHz
616 One Tandy Center
Fort Worth, 76102
General Manager: Frank Muma
(817) 336-1540

Galveston

KILE (AM) 1400 KHz
Box 1441
Galveston, 77553
General Manager: Tom Wisehart
(713) 762-8434

Gonzalez

KCTI (AM) 1450 KHz
P.O. Box 158
Gonzalez, 78629
General Manager: Lawrence M. Walshak
Frank Wilson, Jr.
(512) 672-3631

Hereford

KPAN (AM) 860 KHz
Drawer 1757
Hereford, 79045
General Manager: Clint Formby
(806) 364-1860

KPAN (FM) 106.3 MHz
Drawer 1757
Hereford, 79045
General Manager: Clint Formby
(806) 364-1860

Hondo

KRME (AM) 1460 KHz
1605 Avenue "K", Box 447
Hondo, 78861
General Manager: R. Scott Peden
(512) 426-3367

Houston

KEYH (AM) 850 KHz
3130 Southwest Freeway, Suite 501
Houston, 77098
General Manager: David Armstrong
(713) 527-9240

KLAT (AM) 1010 KHz
P.O. Box 6195
Fort Worth, 76115
General Manager: Ricardo Castillo
(817) 429-1037

KLVL (AM) 1480 MHz
111 N. Ennis Street
Houston, 77003
General Manager: Felix Morales
(713) 225-3207

KXYZ (AM) 1320 KHz
P.O. Box 87190
Houston, 77287
General Manager: Hugo Cadelago
(713) 472-2500

Kenedy-Karnes City

KAML (AM) 990 KHz
Rt. 1, P.O. Box 990
Karnes, 78118
General Manager: Dayton Smith
(512) 780-3393

Lamesa

KTOT (FM) 104.7 MHz
P.O. Box 1188
Lamesa, 79331
General Manager: Jimmy K. Young
(806) 872-2404

Laredo

KVOZ (AM) 1490 KHz
P.O. Box 1638
Laredo, 78041
General Manager: Bill Harrell
(512) 723-4396

KLAR (AM) 1300 KHz
Norton & S. Zapata Highway, Box 1899
Laredo, 78041
General Manager: Jay Dickey
(512) 723-7459

XEAS (AM) 1410 KHz
1140 Airway Boulevard
El Paso, 79982
General Manager: John Doran
(915) 778-9886

XENU (AM) 1550 KHz
1140 Airway, Suite 103
El Paso, 79925
General Manager: John Doran
(915) 778-9886

XEWL (AM) 1090 KHz
1140 Airway Boulevard, Suite 100
El Paso, 79982
General Manager: John Doran
(915) 778-9886

XEK (AM) 960 KHz
416 Chevy Chase
Laredo, 78042
General Manager: Eduardo Villarreal
(512) 724-1796

Lubbock

KLFB (AM) 1420 KHz
Box 5697
Lubbock, 79417
General Manager: Marcelo Tafoya
(806) 765-8114

McAllen-Brownsville-Harlingen

KGBT (AM) 1530 KHz
Drawer 711
Harlingen, 78551
General Manager: Tony Solis
(512) 423-3910

KIRT (AM) 1580 KHz
608 S. Tenth Street
McAllen, 78501
General Manager: C.T. McKasson
(512) 686-2111

KIWW (FM) 96.1 MHz
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Harlingen, 78550
General Manager: Raul Hernandez
(512) 423-3211

KQXX (FM) 98.5 MHz
608 S. Tenth Street
McAllen, 78501
General Manager: C.T. McKasson
(512) 686-2111

Midland-Odessa

KJJT (AM) 1000 KHz
P.O. Box 7319
Odessa, 79760
General Manager: Adan Cevarios
(915) 337-2363

KWEL (AM) 1070 KHz
3306 Andrews Highway
Midland, 79703
General Manager: Bob Hicks
(915) 697-7300

Muleshoe

KMUL (AM) 1380 KHz
608 W. 8th Street, Box 486
Muleshoe, 79347
General Manager: Gerald Reid
(806) 272-4273

Pearsall

KVWG (AM) 1280 KHz
P.O. Box K
Pearsall, 78061
General Manager: Elizabeth Sifuentes
(512) 334-2500

Pecos

KIUN (AM) 1400 KHz
316 S. Cedar, P.O. Box 469
Pecos, 79772
General Manager: Bill Randall Cole
(915) 445-2497

Pleasanton

KBOP (FM) 98.3 MHz
P.O. Drawer U
Pleasanton, 78064
General Manager: Norman D. Phillips
(512) 569-2194

Port Lavaca

KGUL (AM) 1560 KHz
P.O. Box 386
Port LaVaca, 77979
General Manager: Paul Spurlock
(512) 552-2951

Ralls

KCLR (AM) 1530 KHz
P.O. Box 340, 709 Main Street
Ralls, 79357
General Manager: F.T. Wilson
(806) 253-2623

Rosenberg-Richmond

KFRD (AM) 980 KHz
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Rosenberg, 77471
General Manager: George Thompson
(713) 342-6601

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KSJT (FM)
Box 1878
San Angelo, 79602
General Manager: Audrey Lewis
(915) 655-7161

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KCOR (AM) 1350 KHz
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San Antonio, 78207
General Manager: Nathan Safir

KEDA (AM) 1540 KHz
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San Antonio, 78204
General Manager: Manuel G. Davila Sr.
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KFHM (AM) 1150 KHz
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San Antonio, 78212
General Manager: Angel Toledo
(512) 224-1166

KXET (Formerly KVAR) (FM) 104.0 MHz
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San Antonio, 78215
General Manager: Hernan Quezada Escandon
(512) 226-6444

San Marcos

KCNY (AM) 1470 KHz
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San Marcos, 78666
General Manager: Buddy Moser
(512) 396-3354

Sonora

KVRN (AM) 980 KHz
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Sonora, 76950
General Manager: Mike Street
(915) 387-3553

KVRN (FM) 92.1 MHz
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Sonora, 76950
General Manager: Mike Street
(915) 387-3553

Taylor-Austin

KRGT (FM) 92.1 MHz
Route 1, Box 152-A
Hutto, 78634
General Manager: Marcelo Tafoya
(512) 255-1261

KTAE (AM) 1260 KHz
Box 1160
Taylor, 76574
General Manager: Gillis Conoley
(512) 352-3631

Texas City

KYST (AM) 92 KHz
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Houston, 77054
General Manager: Cruz Belasque
(713) 791-9292

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KVOU (AM) 1400 KHz
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Uvalde, 78801
General Manager: Bill Vance
(512) 278-2555

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KCGL (FM) 105.5 MHz
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Bountiful, 84010
General Manager: Richard A. Schwartz
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Quincy

KWNC (AM) 1370 KHz
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Quincy, 98848
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(509) 787-4461

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B. PRINT MEDIA

The Hispanic Print media has not experienced the same rapid growth rate as the electronic media. Nevertheless, some of the major Hispanic centers of population are served by Spanish language daily newspapers; many have Spanish language weeklies. In addition to reporting on world events, Spanish language newspapers provide their readers with issues and concerns relative to the Hispanic communities.

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La Prensa Munoz, Inc.
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812 Santa Fe Drive
Denver, 80204
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Chicago, 60647
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El Manana Daily News
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(312) 521-9137

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American Association of Teachers
of Spanish & Portuguese
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Holy Cross College
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Lansing, 48906
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Hispanic Aging & Health
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Durham, 03824
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Santa Fe, 87501
(505) 988-5541

Santa Rosa

The News - Las Nuevas
(Formerly Santa Rosa News)
P.O. Drawer P
Santa Rosa, 88435
(505) 472-5454

Socorro

Defensor - Chieftain
P.O. Box Q, 911 California
Socorro, 87801
(505) 835-0520

Taos

The Taos News
Robin McKinney
P.O. Box U
Taos, 87571
(505) 758-2241

NEW YORK

Brooklyn

Nuevo Amanecer
The Tablet Publishing Co.
1 Hanson Place
Brooklyn, 11243
(212) 789-1500

Long Island

Long Island Journal
14 E. Park Avenue
Long Beach, 11561
(516) 889-1822

New York City

El Diario - La Prensa
143-155 Varick Street
New York, 10013
(212) 807-4600

Latin New York
419 Park Avenue South
New York, 10016
(212) 686-6036

La Voz Hispania
1650 Broadway, Suite 510
New York, 10016
(212) 581-4909

El Tiempo de Nueva York
G.P.O. Box 1155
New York, 10116
(212) 446-1785

Syracuse

The Impartial Citizen
P.O. Box 98, Colvin Station
Syracuse, 13205
(315) 635-6318

RHODE ISLAND

Providence

Nuevos Horizontes
484 Elmwood Avenue
Providence, 02907
(401) 941-3388

TEXAS

Brownsville

El Heraldo de Brownsville
P.O. Box 511, 1310 S. Commerce
Harlingen, 78550
(512) 423-5511

Carrizo Springs

Carrizo Springs Javelin
P.O. Box 188
Carrizo Springs 78834
(512) 876-2318

Corpus Christi

South Texas Catholic
Diocese of Corpus Christi
620 Lipan
Corpus Christi, 78401
(512) 882-6191

Dallas

El Sol de Texas
Jesus Gutierez
P.O. Box 2638
Dallas, 75221
(214) 386-9120

Houston

Revista Chicano - Riquena
University of Houston
Central Campus
Houston, 77004
(713) 749-4768

Laredo

Laredo Morning Times
P.O. Box 2129
111 Esperanza Drive
Laredo, 78041
(512) 723-2901

Rio Grande City

Rio Grande Herald
P.O. Box 452
Rio Grande City, 78582
(512) 487-2819

San Antonio

Southside Sun
Express News Corp.
P.O. Box 2171
San Antonio, 78297
(512) 225-7411

Visitante Dominical
El Visitante Dominical Inc.
P.O. Box 96
San Antonio, 78291
(512) 736-1916

Westside Sun
Express News Corp.
P.O. Box 2171
San Antonio, 78297
(512) 225-7411

XI. CONCLUSIONS

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The 1980 Census placed the U.S. Hispanic population at 14.6 million persons. In the past five years, it has grown 20% to 17.6 million persons, and SRC projects a Hispanic population of 21 million by 1990 and 27 million by 2000.

Almost 60% of the U.S. Hispanic population is of Mexican origin. Puerto Ricans, Cubans and Dominicans make up the largest other national groups.

The median age is 23.6 years.

The average household size is 3.92 persons.

A total of 84% of the U.S. Hispanic Market is concentrated in the Top 30 Hispanic Markets.

Over 50% of the Market is concentrated in the Top Six Hispanic Markets. They are:

Rank	Market (ADI)	Hispanic Population (000)
1	Los Angeles	3,353.7
2	New York	2,442.3
3	Miami	863.5
4	San Antonio	781.8
5	Chicago	741.4
6	San Francisco	717.2

Among U.S. Hispanics, Spanish is the language which is spoken better, written better and read better.

Compared to English, the Spanish language proficiency is almost three times greater than the English language proficiency.

Over 90% of U.S. Hispanics learned Spanish as their "first language spoken."

More than two-thirds of U.S. Latins prefer to speak Spanish in the home.

When shopping, Hispanics feel that it is very important that stores sell products that are geared to Hispanic tastes.

Approximately 31% of Hispanics have listed telephones, and 32% have no phone at all. Thirty-seven percent have a phone which is not listed.

In every U.S. Hispanic Market Spanish language radio, television and print media are available to serve the Spanish language Market.

For instance, Los Angeles and Miami both have seven full-time Spanish language radio stations. Los Angeles has two Spanish language TV stations, as does San Francisco, New York, Chicago and Miami.

There are over 80 full time Spanish language radio stations, and nearly 20 full time Spanish language television stations to be in operation in 1985 in the U.S.

Network television is provided by SIN Television Network, and Cable by Galavision and others. Radio networking is available through the Caballero Radio Network.

Each major market has Spanish language newspapers and magazines of both local and national distribution to serve the market.

For instance, De Armas Magazine Network provides five U.S. editions of Buenhogar, Cosmopolitan en Espanol, The Ring en Espanol, Tu and Vanidades Continental.

On a typical day, 67% of the U.S. Hispanics watch Spanish language television and 47% listen to Spanish radio. Approximately 21% read Spanish newspapers, and 19% read a Spanish magazine - as measured by Day-After Media Reporting.

On a typical day, a viewer watches 2.4 hours of Spanish television and listens to 1.2 hours of Spanish radio.

Median family income among Hispanics is now $19,900 per household.

Total aggregate household income for the U.S. Hispanic Market approximates $124 billion.

Personal consumption expenditures in 1985 should reach $94 billion.

In the past 30 years, almost one-third of all immigrants to the U.S. came from Spanish speaking countries.

They represent the largest group of current immigrants to the U.S.

The underlying reasons for immigration to the U.S. are economic, political and social in nature, and the conditions which have fostered the past 30 years emigration are still in effect. Thus, the rate of potential future Latin arrivals, both legal and illegal, is estimated to continue to dominate U.S. immigration in the 1980's and 1990's.

Therefore, the U.S. Latin Market will continue to grow, swelling its numbers to well over 20 million persons.

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